

Volunteer Director Job Aid

Objective: The Job Aid is a reference guide for the Volunteer Director/Manager's responsibilities in the My Turn Volunteer system. With screen shots and step-by-step instructions, this manual is meant to assist Volunteer Directors/Managers in operating successful clinics with volunteer support using the My Turn Volunteer system.

Curriculum Overview:



Volunteer Management Dashboard

- Welcome Email
- View Volunteer Management Dashboard
- Reporting



Clinic Management

- Access Skedulo to manage volunteer shifts
- Clone existing shifts/jobs from My Turn Volunteer portal
- Group Codes
- View clinic details
- Clinic Dashboards
- Assigning Volunteer Managers
- Approving Volunteer Managers



Volunteer Resource Management

- Volunteer Experience Overview
- Import CSV files with Volunteer data
- Edit and vet Volunteer records
- Visibility to Volunteer Training Submissions
- Mass Update Volunteers
- Send bulk emails to Volunteers



Preparation The Week Of The Clinic

- 72 hours before the clinic
- 48 hours before the clinic
- 24 hours before shift
- Day of the clinic



Need assistance?

myturnvolunteer@californiavolunteers.ca.gov

Volunteer Director Job Aid

What's new?

10/29/21 Release Updates:

This deployment includes the new features and enhancements to:

- Create Volunteer Shifts within the 'Jobs' tab

Previous Updates:

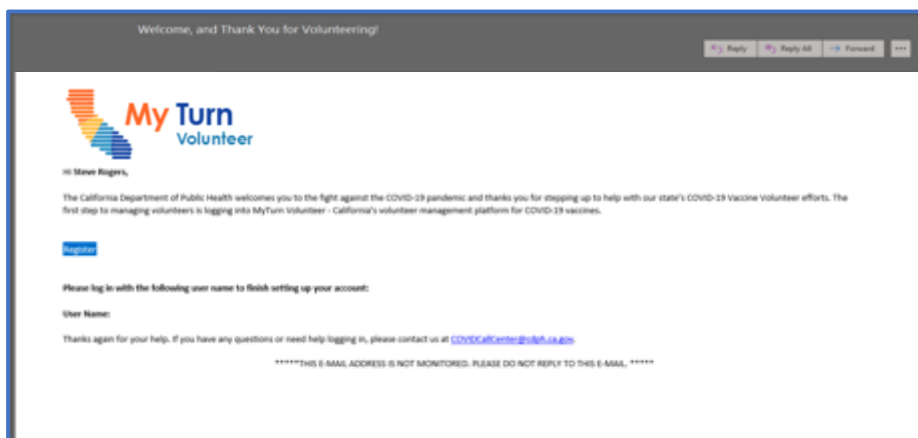
- Clone volunteer shifts for easier scheduling
- Import volunteer data into My Turn Volunteer through CSV files in order to quicken the volunteer's ease in registering for a shift.
- Ability to assign same individual as a VD for multiple clinics
- Add Volunteer Directors or Volunteer Managers with one click through the 'add users' feature

Section 1: Volunteer Management Dashboard

We will start our journey as a Volunteer Director by first understanding the preparation needed to set up a clinic. This section will cover the Welcome Email and My Turn Volunteer dashboard, Let's get started!

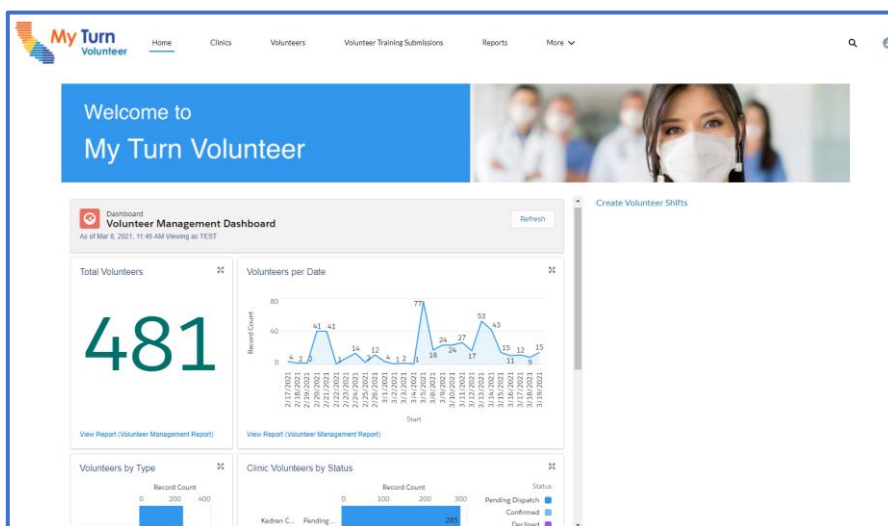
1 The Welcome Email

As a Volunteer Director, you will receive a welcome email including a link to the My Turn Volunteer website. First, click on the link and complete the online registration form.



2 Homepage and Main Dashboard

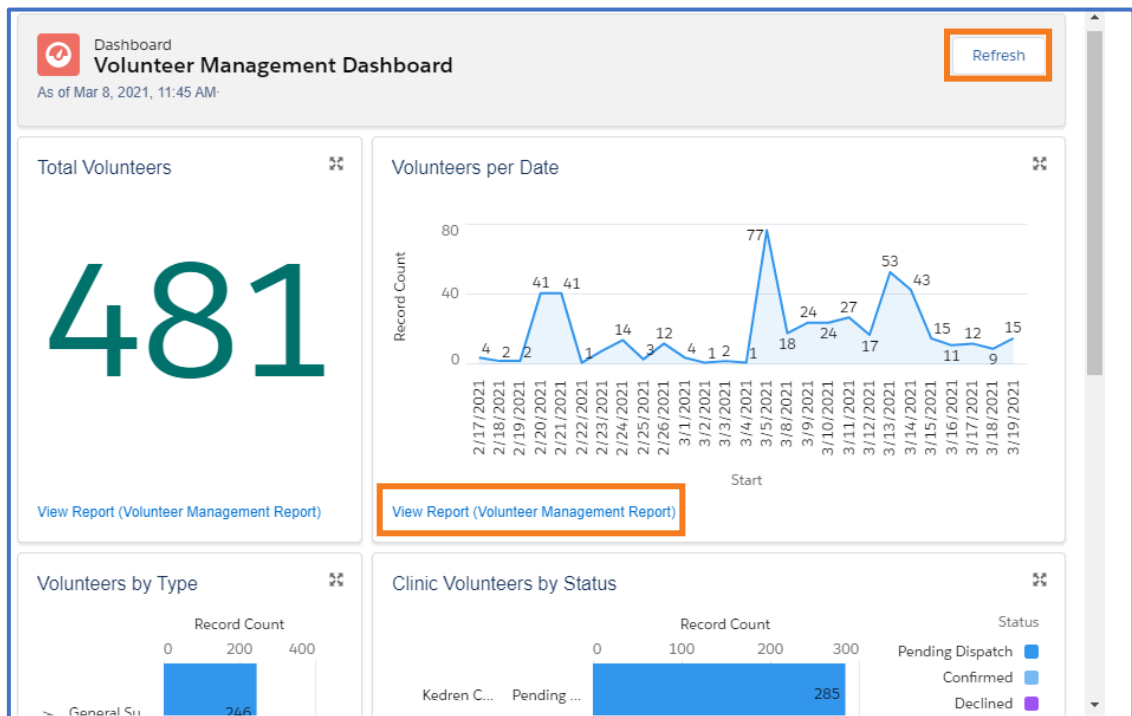
Once you have access to the [homepage](#), you will have the ability to manage shifts, manage volunteers, and request Volunteer Managers.



2 Homepage and Main Dashboard (continued)

The Volunteer Management Dashboard is an interactive way to view data from multiple reports. When you click **refresh**, it can be updated in real time. The Volunteer Management Dashboard consists of five sections:

- Total Volunteers - number of all volunteer resources who have registered for a shift at clinic event. Note: this is not unique, as it includes those who have registered for multiple shifts
- Volunteers per Date – line graph showing the number of volunteer resources who will be working a shift on a particular day. Note: volunteers reflected here are not all vetted/trained
- Volunteers by Type – bar graph showcasing the number of Medical Volunteers vs General Support Volunteers
- Volunteers by Status (not shown) – bar graph showcasing how many volunteer resources are in each status: Pending Dispatch, Confirmed, Declined, Deleted
- Clinic Volunteers by Status – incorporates the Volunteers by Status by listing every active clinic and detailing the status for each of their volunteers



In each of the five sections, you can click **View Report** at the bottom that will navigate you to see the full report.

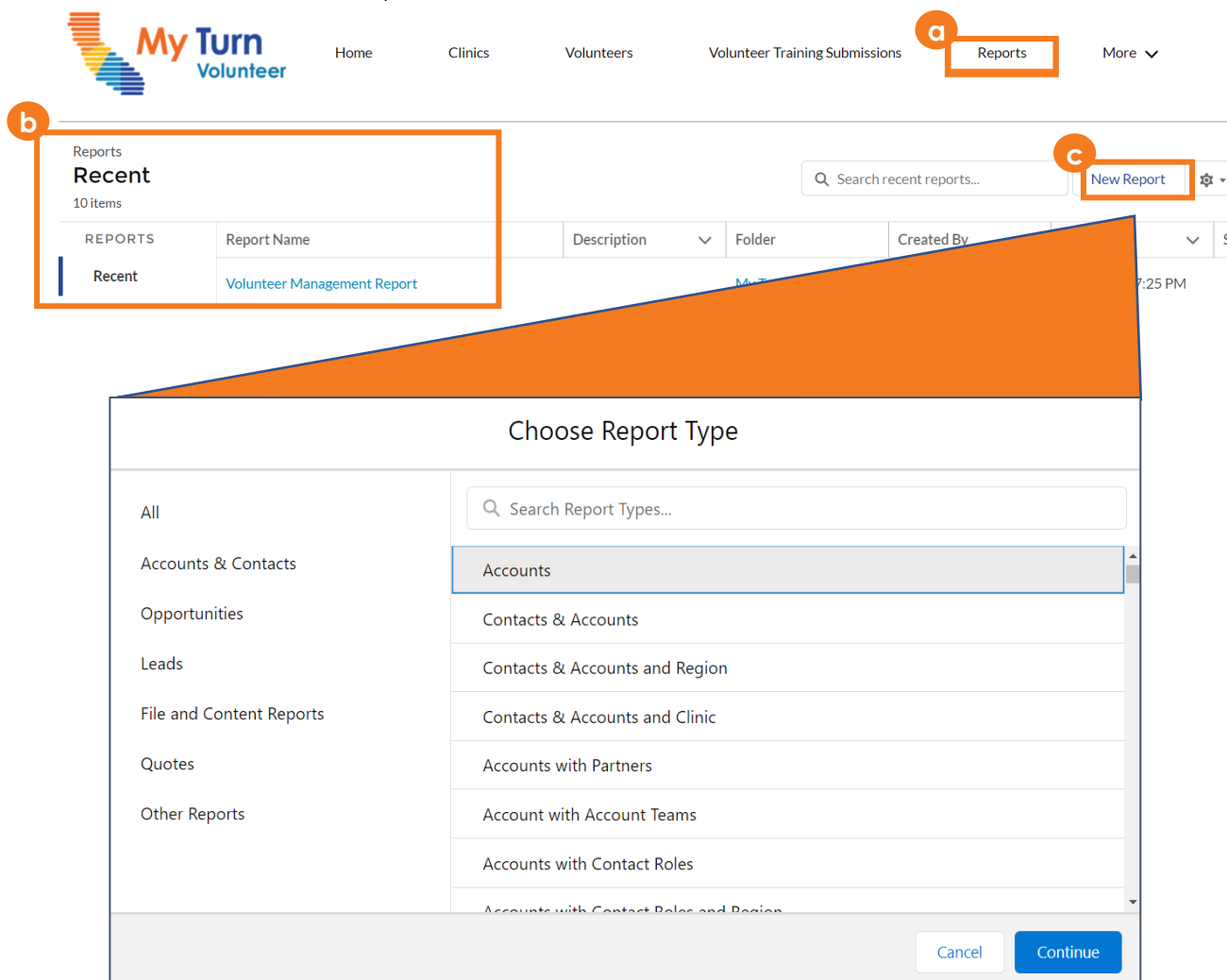
3 Reporting

The Reports tab offers options to create reports and spreadsheets with the information you need for your clinic. Here, you can select what data you'd like in the report. You can also save reports templates so that you can access them easily in the future.

a. Click on the "Reports" tab at the My Turn Volunteer Home Page.

b. You can see your previously saved reports here. You can either view Recent Reports or "All" reports.

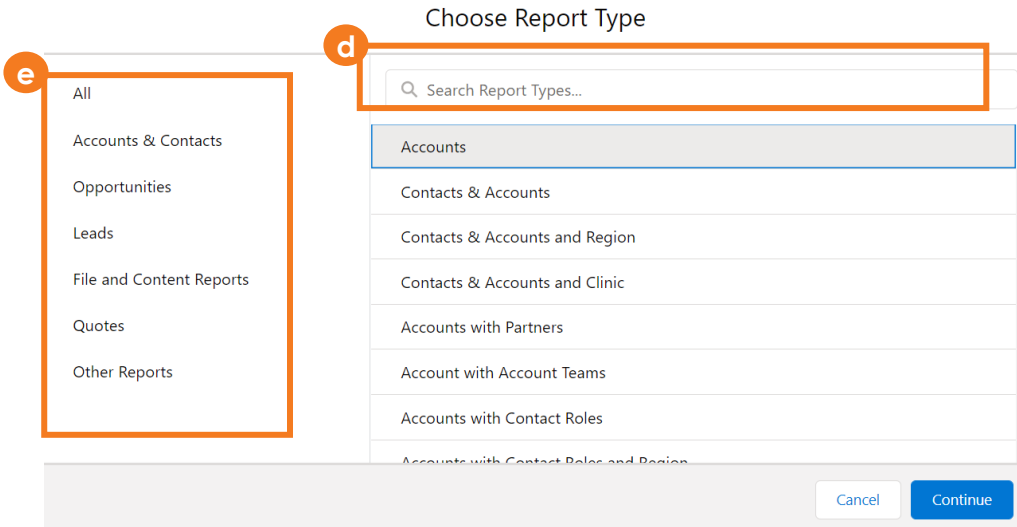
c. Select "New Report". This will create a pop up with Report Type information.



The screenshot shows the My Turn Volunteer web application. At the top, the navigation bar includes links for Home, Clinics, Volunteers, Volunteer Training Submissions, and Reports (highlighted with an orange box and label 'a'). Below the navigation bar, the Reports section is visible. On the left, there's a sidebar with 'Recent' (highlighted with an orange box and label 'b') and 'All' report categories. The main area shows a table of recent reports, with the first report being 'Volunteer Management Report'. A search bar for recent reports is also present. On the right, a 'New Report' button is highlighted with an orange box and label 'c'. Below the main content, a modal window titled 'Choose Report Type' is open, showing a list of report types on the left and a search bar on the right. The 'Accounts' report type is selected. At the bottom of the modal are 'Cancel' and 'Continue' buttons.

3

Reporting (continued)



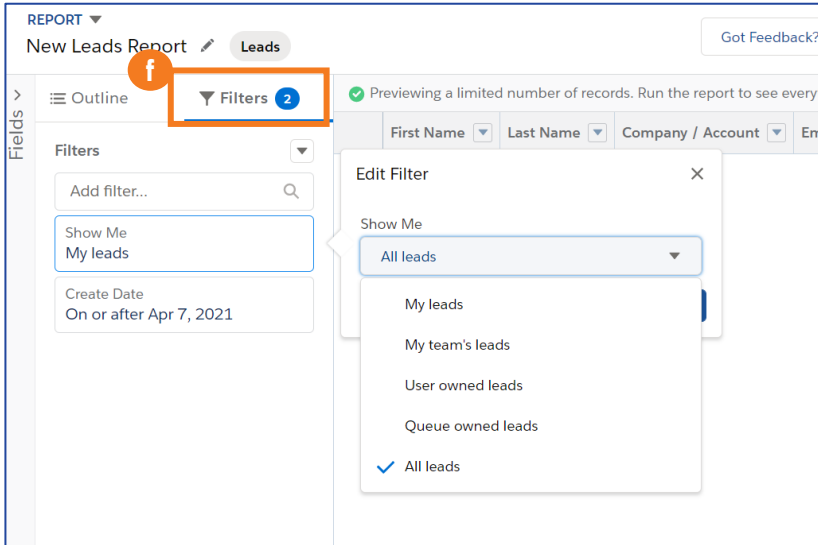
d. If you know the type of report you would like to run, you can type the category into the search bar.

You will be able to add additional information, such as the clinic, but you must select the focus of your report.

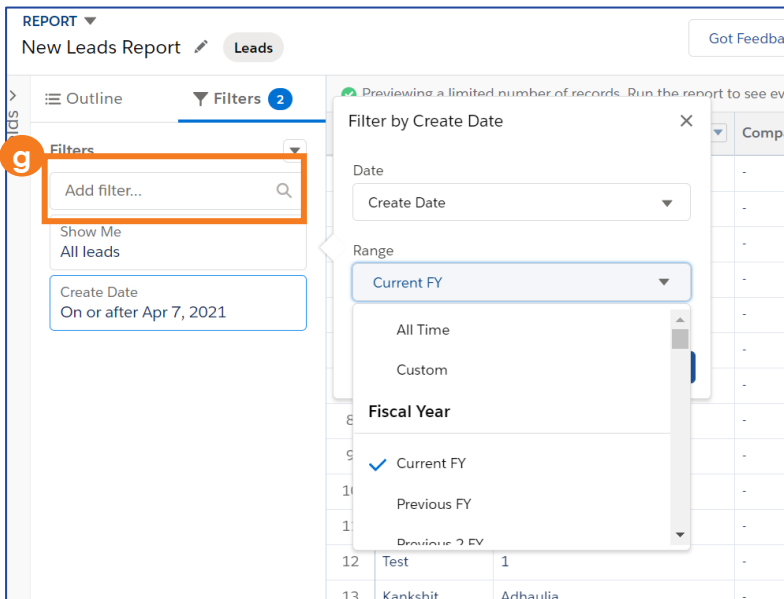
e. **There are five sub-categories on the left hand side.** These sub categories can help you find what you're looking for without knowing the exact name. If you'd like to browse report types, you can select one of the following and options will enter the drop down so that you can select what you need:

- All - All categories
- Accounts & Contacts - Reports focused on accounts (clinic and Provider info), contacts (volunteers), or accounts and contacts.
- Opportunities - These reports are not applicable for My Turn Volunteer.
- Leads - Leads capture the volunteers that come to the community landing page, submit an interest form, but do not register for a shift. It also captures volunteers that complete a training form, but submit information that does not match a resource object.
- File and Content Reports - These reports are not applicable for My Turn Volunteer.
- Quotes - These reports are not applicable for My Turn Volunteer.
- Other Reports - All reports not categorized in the other sub categories.

3 Reporting (continued)

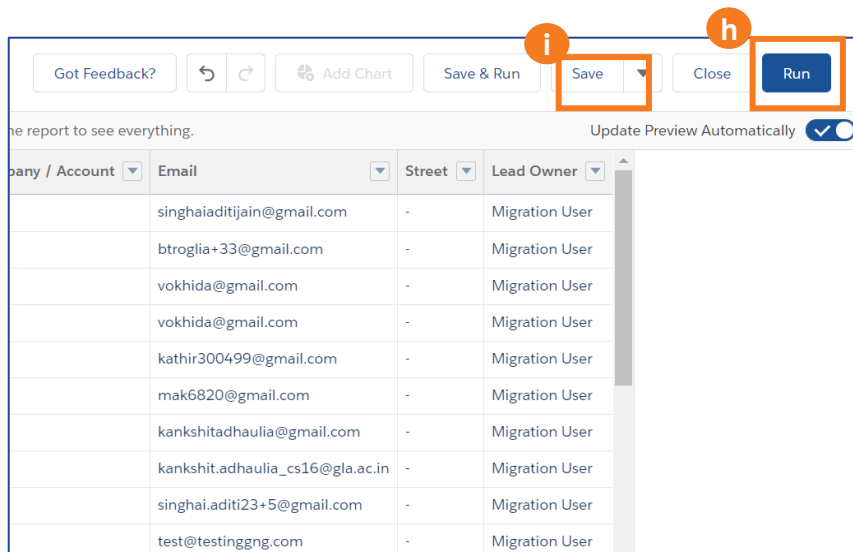


f. Once you've selected your report type, go to the filters tab and select "All Leads" (or all of the category you selected that your clinic has permission to see). If you do not select "all" then you will only see a partial view. If you would like a partial view, you have the option to select what you'd like to view such as filtering by first name.



g. Next, select the filters you would like to see. Here, you can narrow down your search. For example, you can filter by edit date or who created the entry. In this example, we have selected Create Date. Within this, you can see different options by which to filter.

3 Reporting (continued)



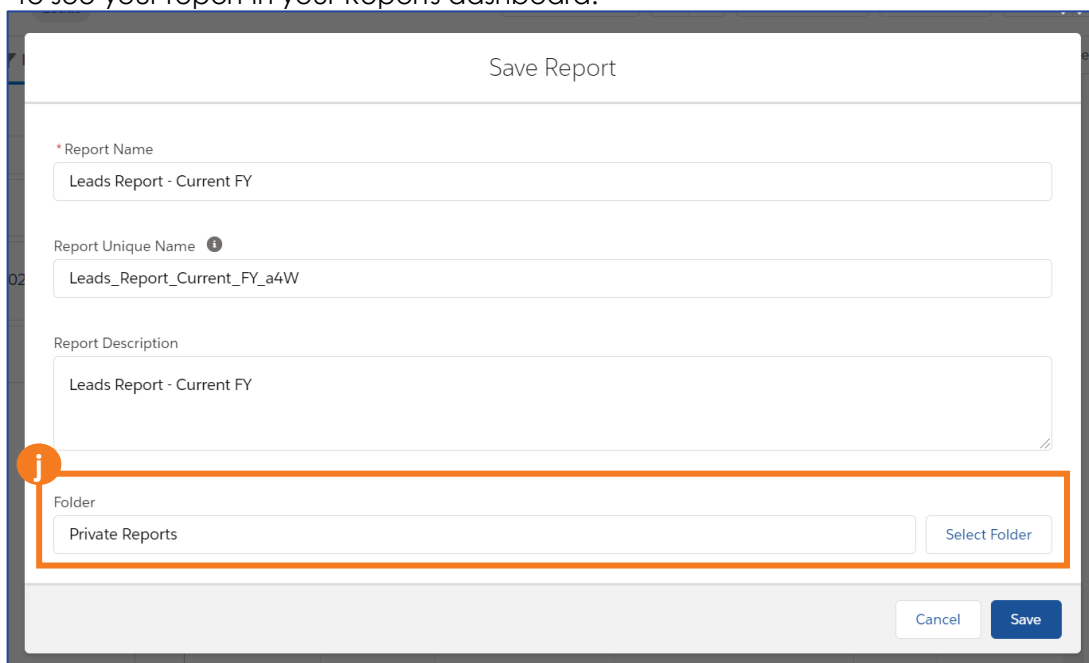
The screenshot shows a reporting interface with a table of data and a top navigation bar. Annotation 'i' points to the 'Save' button, and annotation 'h' points to the 'Run' button.

Company / Account	Email	Street	Lead Owner
	singhaiaditijain@gmail.com	-	Migration User
	btrogli+33@gmail.com	-	Migration User
	vokhida@gmail.com	-	Migration User
	vokhida@gmail.com	-	Migration User
	kathir300499@gmail.com	-	Migration User
	mak6820@gmail.com	-	Migration User
	kankshitadhaulia@gmail.com	-	Migration User
	kankshit.adhaulia_cs16@glia.ac.in	-	Migration User
	singhai.aditi23+5@gmail.com	-	Migration User
	test@testinggng.com	-	Migration User

h. Next, click "Run". This will run the report and show a preview within the site. However, **running the report will not save it**. If you would like to save the report, you will need to "Save and Run."

i. Save and Run will allow this report to be saved.

j. Clicking "Run and Save" will create a pop up that asks you what you would like to name the report. **You should save it in your Private Report folder or else you will have to recreate this report.** When you're ready, click "Save". You will now be able to see your report in your Reports dashboard.



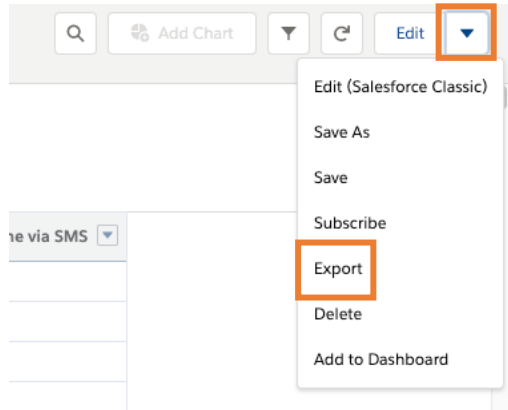
The screenshot shows a 'Save Report' dialog box with the following fields:

- * Report Name: Leads Report - Current FY
- Report Unique Name: Leads_Report_Current_FY_a4W
- Report Description: Leads Report - Current FY
- Folder: Private Reports (highlighted with annotation j)

Buttons: Cancel, Save

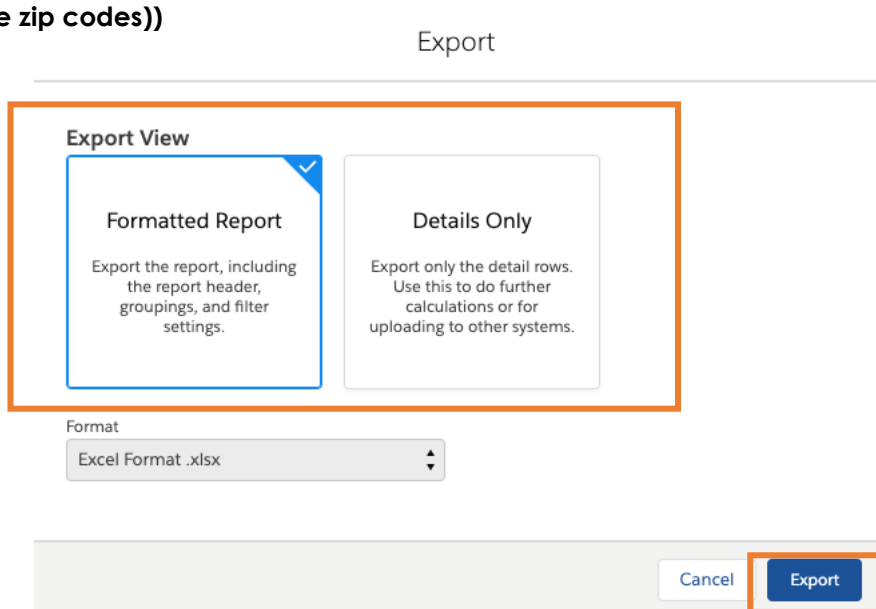
3 Export Report

Click on drop down arrow next to edit button. Select 'Export'



Select the type of export view desired and click "Export". Excel doc will download.

(Note: Exporting full report may provide a broader scope of flexibility to sort/filter (ex. Filter report by multiple zip codes))



3 My Turn Volunteer Exec Grouped Report

This report shows high level shift stats (Volunteers needed, filled, etc.) per clinic. Helps assess what roles still need to be filled.

Key Performance Indicators (KPIs)

- Total Records - number of clinics
- Total # of Confirmed Shifts - the Sum of all confirmed shifts in all shift timings for this clinic
- Total Number of Open Shifts - remaining shifts to be filled at the clinic
- Total # off Vaccine Preps Needed – total resources needed for this specific volunteer role
- Total # of Vaccine Preps Filled - total volunteers assigned for this role
- Total Number of Vaccinators Filled - total resources needed for this specific volunteer role

Report: Clinics MTV Exec Grouped Report							Q	Add Chart	Y	C	Edit	
Total Records	Total # of Confirmed Shifts	Total Number of Open Shifts	Total # of Total Vaccine Preps	Total # of Vaccine Preps Needed	Total # of Vaccine Preps Filled	Total # of Vaccinators Filled						
15	168	2,633	333	241	92	126						
<input type="checkbox"/> Clinic: Clinic Name ↑ <input type="checkbox"/> # of Confirmed Shifts <input type="checkbox"/> Number of Open Shifts ↑ <input type="checkbox"/> # of Total Vaccine Preps <input type="checkbox"/> # of Vaccine Preps Needed <input type="checkbox"/> # of Vaccine Preps Filled <input type="checkbox"/> # of Total Vaccinators												

Report Link: [Click Here](#)

Volunteer Director Contact Info Report

This report shows Volunteer Director contact information per clinic.

Key Performance Indicators (KPIs)

- Total Records - number of clinics

Report: Clinics with Assigned Volunteer Director Volunteer Director Contact Info Report						Q	Add Chart	Y	C	Edit	
Total Records 15											
Clinic: Clinic Name	Assigned Volunteer Director: County	Assigned Volunteer Director: First Name	Assigned Volunteer Director: Middle Name	Assigned Volunteer Director: Last Name							

Report Link: [Click Here](#)

3 Volunteer Director – Daily Volunteer Shift

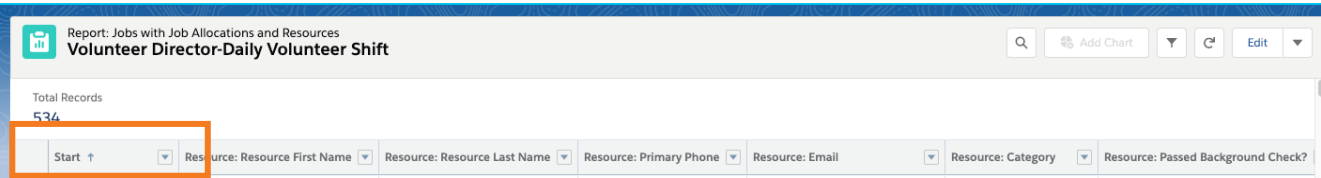
This report shows Volunteer contact information along with additional volunteer descriptors.

Key Performance Indicators (KPIs)

- Total Records - number of allocated shifts

Key Fields

- Category – type of volunteer (medical or general support)
- Passed Background Check? – Y/N field if volunteer has passed background check
- Completed Volunteer Training? – Y/N field if volunteer has completed training
- Status – Volunteer status on whether they have been verified or not
- Time Checked In – manual input field (person checking in person, will write down time volunteer checked in).
- Time Completed – manual input field (person checking out person, will write down time volunteer completed shift).



Report: Jobs with Job Allocations and Resources
Volunteer Director-Daily Volunteer Shift

Total Records: 534

Start ↑ | Resource: Resource First Name | Resource: Resource Last Name | Resource: Primary Phone | Resource: Email | Resource: Category | Resource: Passed Background Check?

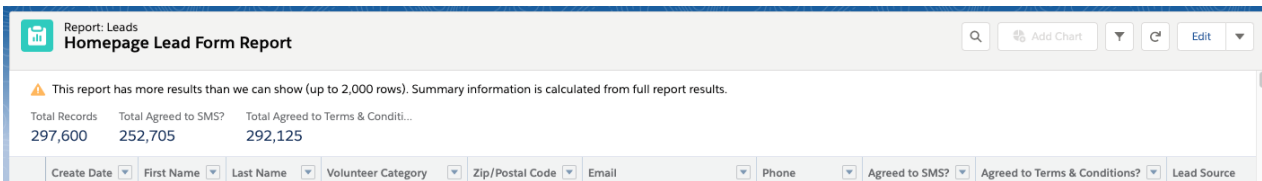
Report Link: [Click Here](#)

Homepage Lead Form Report

This report shows total number of leads and their contact information.

Key Performance Indicators (KPIs)

- Total Records - number of leads
- Total Agreed to SMS? – number of leads who agree to be contacted via SMS
- Total agreed to Terms & Conditions - number of leads who agree to terms and conditions



Report: Leads
Homepage Lead Form Report

⚠ This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records	Total Agreed to SMS?	Total Agreed to Terms & Conditions...
297,600	252,705	292,125

Create Date | First Name | Last Name | Volunteer Category | Zip/Postal Code | Email | Phone | Agreed to SMS? | Agreed to Terms & Conditions? | Lead Source

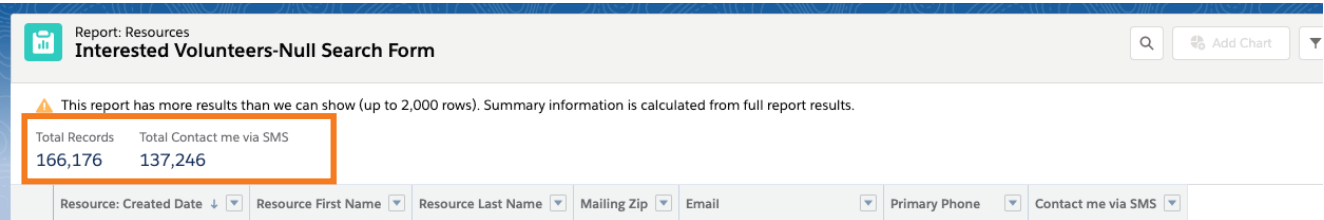
Report Link: [Click Here](#)

3 Interested Volunteers – Null Search Form

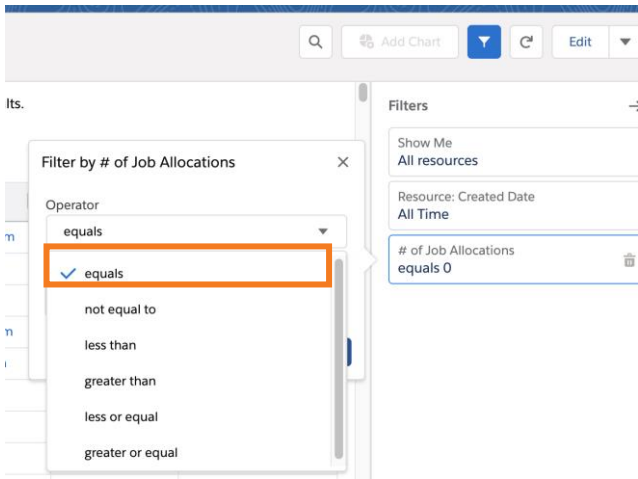
This report shows total number of volunteers who are interested in volunteering and have not signed up for a shift (unaffiliated volunteers).

Key Performance Indicators (KPIs)

- Total Records - number of unaffiliated volunteers
- Total Contact me via SMS – number of unaffiliated volunteers who agree to be contacted via SMS



To show all volunteers who have signed up for a shift, you must select the filter “# of Job Allocations” Then set the Operator to “does not equal 0” and click “Apply”



Report Link: [Click Here](#)

3 Verified Volunteers for Past Jobs Report

This report shows total number of verified volunteers who have successfully completed previous jobs.

Key Performance Indicators (KPIs)

- Total Records – number of allocated shifts

Key Fields

Job # – Auto-numbered field from Skedulo for grouping of volunteer shifts

Job Allocation # – Overview of comprehensive details associated to Job #

Clinic Name – Name of Clinic

Clinic Address – Address of Clinic

Volunteer Name – Name Associated of Volunteer in Volunteer Record

Volunteer Email – Email address associated in Volunteer Record

Volunteer Status – Volunteer status on whether they have been verified or not

Time Checked In – Manual input field (once the volunteer has been checked in, the system will add the time the volunteer was scheduled to show up to the database)

Time Completed – Manual input field (once the volunteer has been checked out, the system will add the time the volunteer was scheduled to end their shift to the database)

Report: Jobs with Job Allocations and Resources

Verified Volunteers for Past Jobs

🔍

Add Chart

⌵

↺

Edit

⌵

Total Records

86

	Job: Job Name	Job Allocation: Job Allocation Name	Resource: Clinic	Address	Start	End	Resource: Resource Name	Resource: Email
1	JOB-3991738	JA-1970	Fake Clinic Yankee Stadium	1 E 161 St, The Bronx, NY 10451	5/6/2021, 8:00 AM	5/6/2021, 4:00 PM	Prince1 Test	destinyvigil@gmail.com
2	JOB-1744076	JA-69	Fake Clinic Yankee Stadium	10984 Strathmore Drive, Los Angeles, CA 90024	3/16/2021, 7:15 PM	3/16/2021, 10:15 PM	Quincy Adams	destinyrmckee@gmail.com

Report Link: [Click Here](#)

Section 2: Clinic Management

Now that we have seen how to view the home dashboard, let's now understand the role a Volunteer Director plays in the management of clinics. In the next few steps, we will cover how to create new volunteer shifts, viewing clinic details, as well as run reports and dashboards for clinics.



Curriculum Overview:



Volunteer Management Dashboard

- Welcome Email
- View Volunteer Management Dashboard
- Reporting

Next



Clinic Management

- Access Skedulo to manage volunteer shifts
- Clone existing shifts/jobs from My Turn Volunteer portal
- Group Codes
- View clinic details
- Canceling a shift
- Clinic Dashboards
- Assigning Volunteer Managers
- Approving Volunteer Managers



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- Volunteer Experience Overview
- Import CSV files with Volunteer data
- Edit and vet Volunteer records
- Visibility to Volunteer Training Submissions
- Mass Update Volunteers
- Send bulk emails to Volunteers



Preparation The Week Of The Clinic

- 72 hours before the clinic
- 48 hours before the clinic
- 24 hours before shift
- Day of the clinic

New Volunteer Requirements

<div>Quantity</div> <div>2</div>	<div>Tags</div> <div><div>Search ...</div><div>T Vaccinator X</div></div>
<div>Quantity</div> <div>2</div>	<div>Tags</div> <div><div>Search ...</div><div>T Greeter X</div><div>T Spanish X</div></div>
<div>Quantity</div> <div>1</div>	<div>Tags</div> <div><div>Search ...</div><div>T Greeter X</div></div>

Publish Shift

☒ Publish Shift to World Wide Web

Group Code Name

Select an Option

None

1234567895

1234567897

6789012345

Group Code

Next

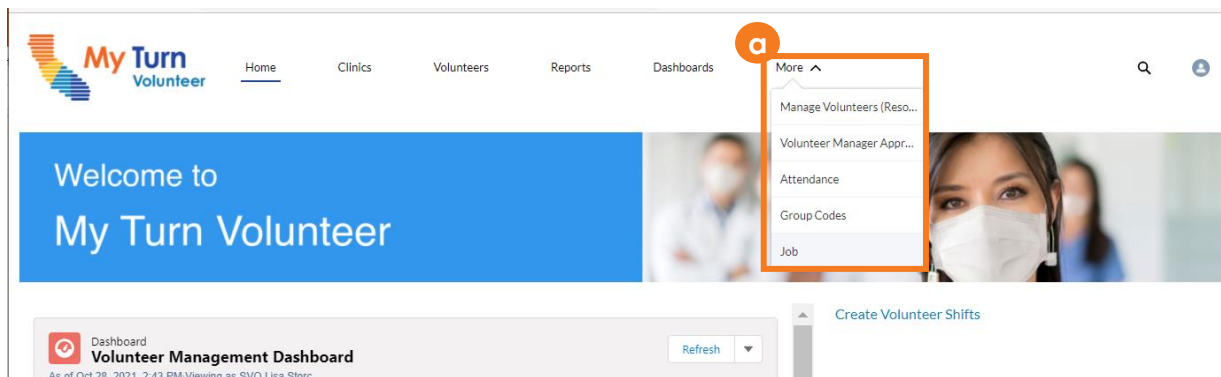
Previous

Save

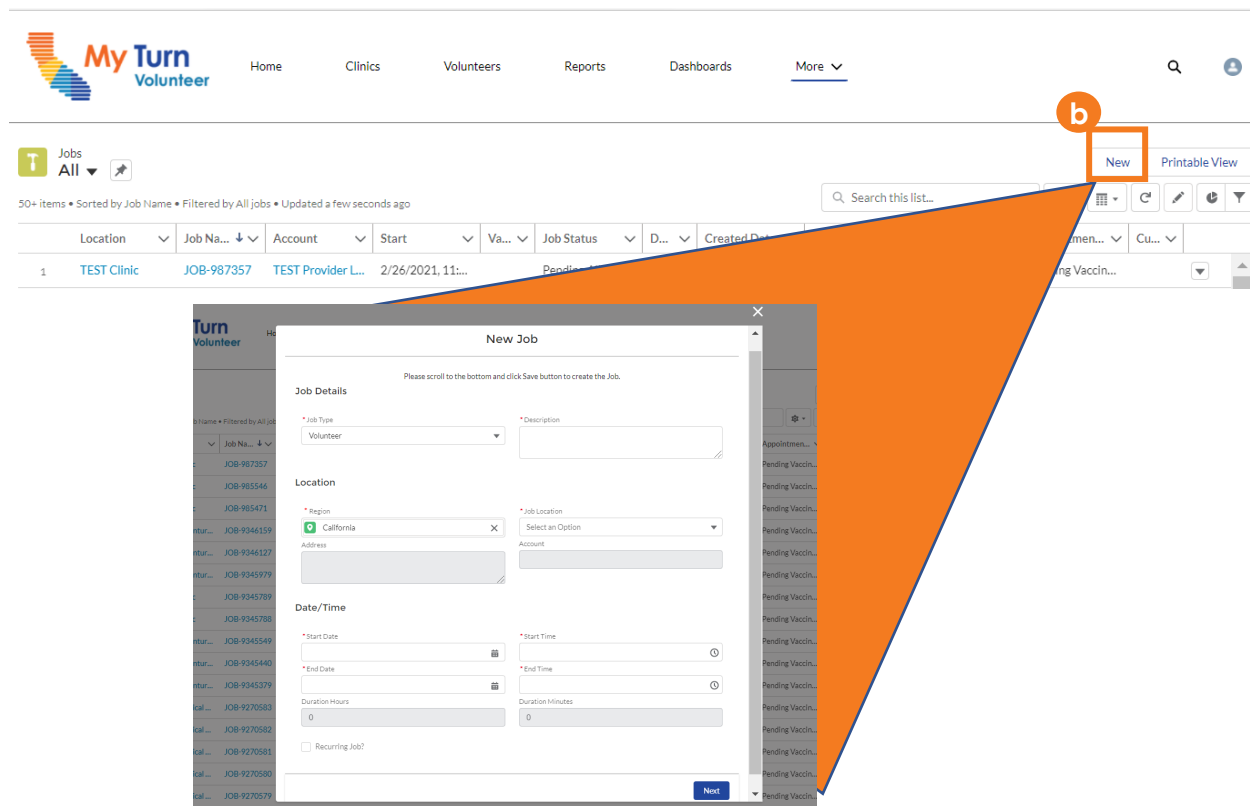
1 Creating New Volunteer Shifts – Job Tab

Let's first see how to navigate and create volunteer shifts for an existing Clinic.

a. Start by clicking on the 'more' tab, then select 'Job'.



b. From the Jobs tab, select the 'New' button. A window will pop up to create a new job.



1 Creating New Volunteer Shifts – Job Tab (continued)

c. Fill out the Job Details.

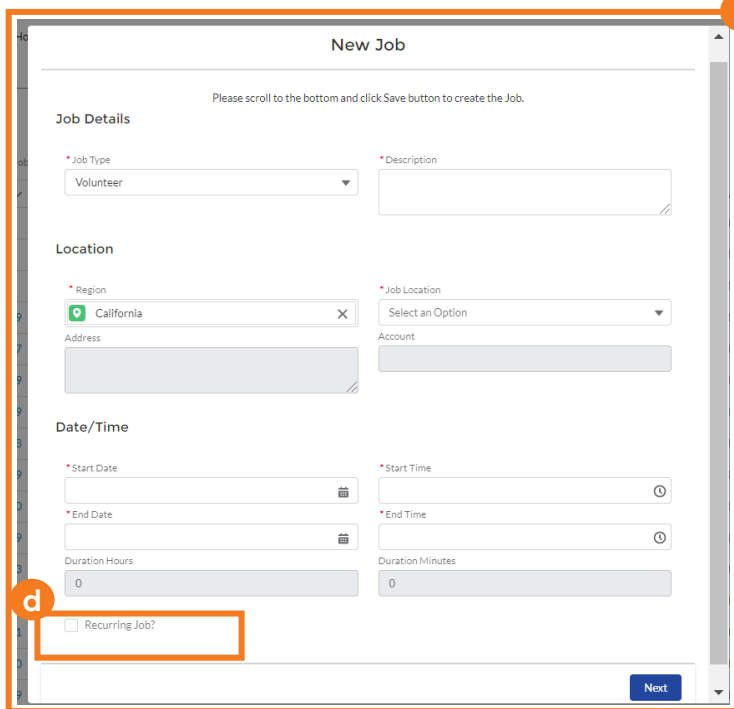
Job Type: Volunteer

The greyed out boxes for Address, Account, Duration (Hours + Minutes) will auto populate.

You may want to list your Volunteer Shift a few minutes before you plan to start vaccines, so that you have time to show your volunteer to their station.

d. You can select 'Recurring Job' if you would like to schedule multiple jobs that have the same:

- Hours
- # and Types of Volunteers
- Location



For the next step, you will need to understand the existing Tags in the system and what they mean. Below is a list of the Tags or Volunteer Roles that you will use when creating Requirements and Volunteer types needed for your clinic.

Volunteer Roles	Volunteer Type	Role Description
Patient Observer	Medical Volunteer	Watch over patients during clinic and after Vaccine has been administered. Takes notes and work closely with Medical staff to document any aftereffects a patient may have after vaccinated.
Vaccinator	Medical Volunteer	Administer the vaccine to patients.
Vaccine Prep	Medical Volunteer	Aid in preparation of Vaccines. May also include appropriate data entry related to vaccines.
Greeter	General Support Volunteer	Help greet, manage the directing and flow of patients, monitor the line, and answer logistical questions from patients.
Registration	General Support Volunteer	Assists in checking in patients and confirming their identity and necessary documentation to align with their vaccine appointment. May also include clerical support and data entry.
Volunteer Management	General Support Volunteer	Assists in the registration, support, and management of volunteers on the clinic day.

1 Creating New Volunteer Shifts – Job Tab (continued)

New Volunteer Requirements

e

Quantity: 2 Tags: Search ... Vaccinator X

Quantity: 2 Tags: Search ... Greeter X Spanish X

Quantity: 1 Tags: Search ... Greeter X

f + Add Row

g Previous Next

e. Now you can list the types of volunteers and how many you will need. Type the tags into the 'search' box by each tag. **You can have up to (1) volunteer type and (1) language per volunteer requirement box.** To review what each tag entails, look at the chart on the previous page.

f. If you would like to add another Volunteer Requirement, click the 'add row' button at the bottom left.

g. When you are done creating your volunteer requirements, click 'next'

h. If you are ready to publish this shift so that Volunteers can locate it, select 'Publish Shift to World Wide Web'.

i. You can assign a Group Code if you would like to restrict this listing to ONLY volunteers who have a group code. If you are looking for volunteers and do not have an existing pool of volunteers, leave the group code at 'none'.

To make a Group Code, review the Group Code section.

Publish Shift

h ☒ Publish Shift to World Wide Web

i Group Code Name: Select an Option
None
1234567895
1234567897
6789012345

Group Code:

k Previous Save

K. Final step: Click 'Save'. Your volunteer shift will be published!

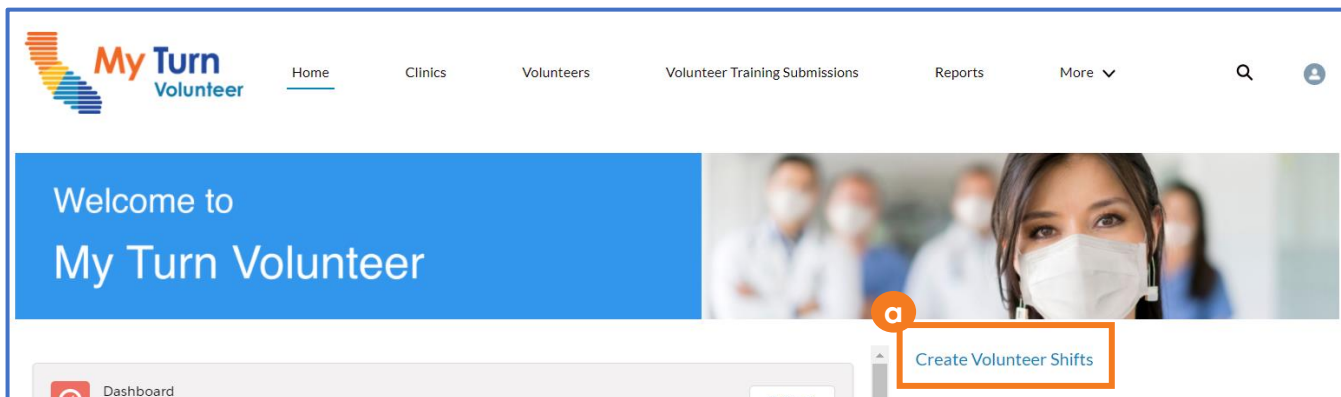
To see your shift, you can search by Zip Code or Group code here:

<https://myturnvolunteer.ca.gov/s/schedule/>

1 Creating New Volunteer Shifts

Let's first see how to navigate and create volunteer shifts for an existing Clinic.

- Start by clicking on the "Create Volunteer Shifts" on the Homepage. This will take you to the Skedulo Web App – a part of the My Turn website that helps with scheduling clinics.

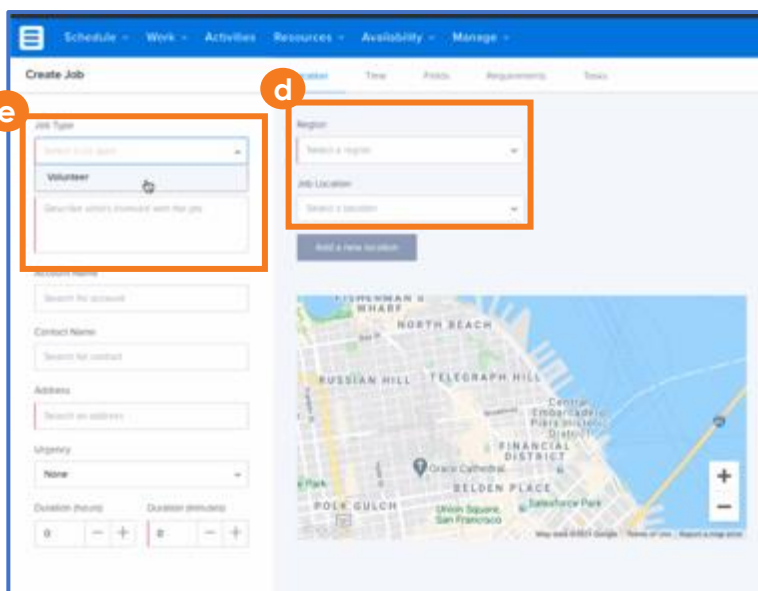
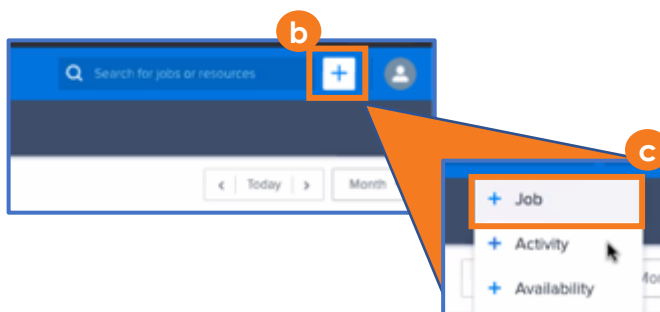


Team Name: CDPHVAX

Environment: Community Calvax Production

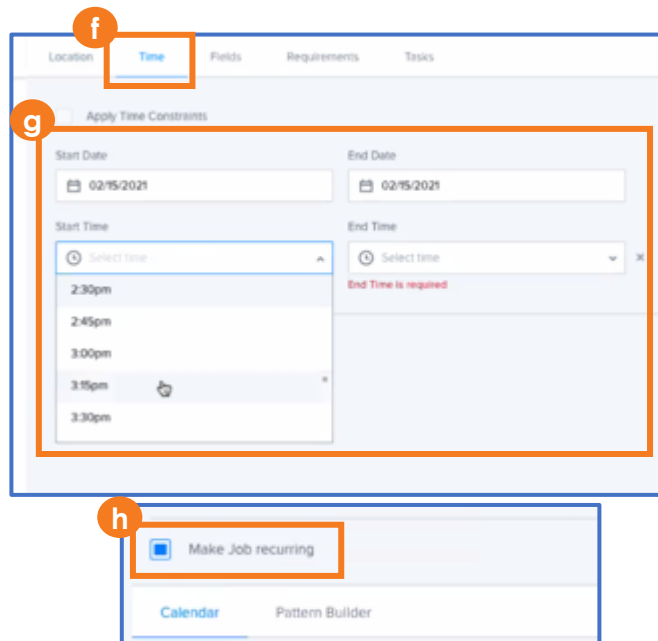
Skedulo Web App

- From the top of the page click on the "+" button.
- Then select "Job" from the drop-down menu
- You will want to fill out the Region and Job Location first as details for address will auto-populate. The Job Location will be the clinic name or area the clinic is in. This data will be populated base off the clinics created in My Turn Clinic.
- You will then select the Job Type of "Volunteer." The Description may auto-populate after you select the Job Type but can alter as needed. This will show externally to volunteers when registering.



1 Creating New Volunteer Shifts (continued)

- f. Next, select the "Time" tab from the top.
- g. Inside of the Time tab you will select the date range for the shift as well as the start and end times.
- h. Optionally, If you select the "Make Job Recurring" button, you have the option to select the calendar dates for when the shift will be repeated.

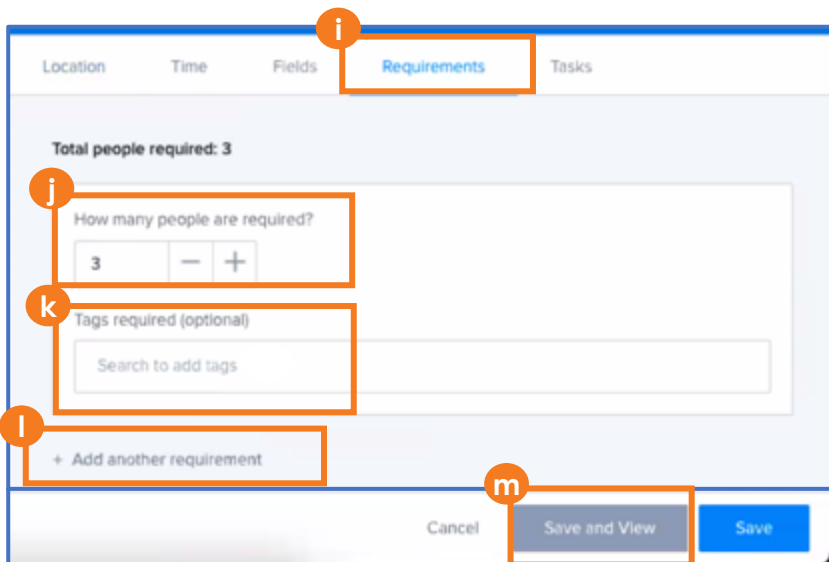
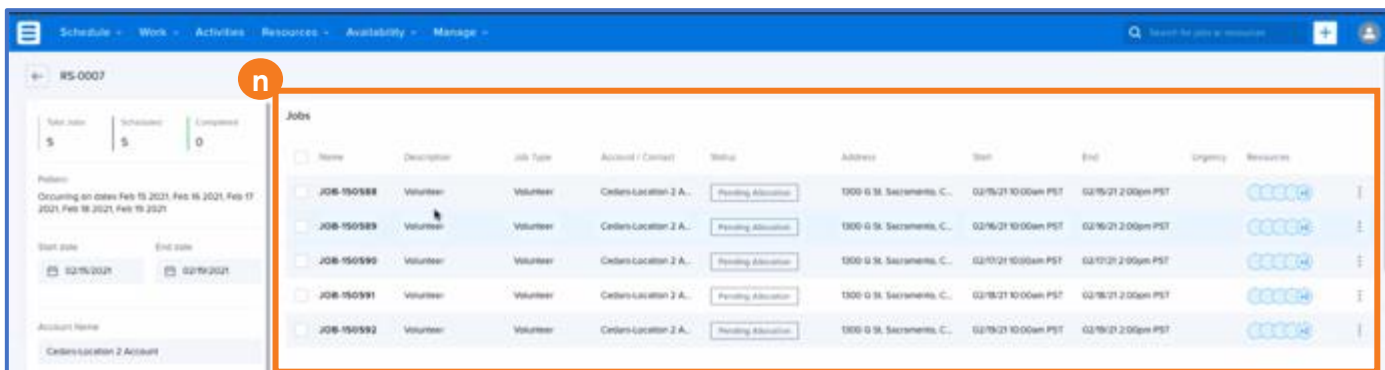


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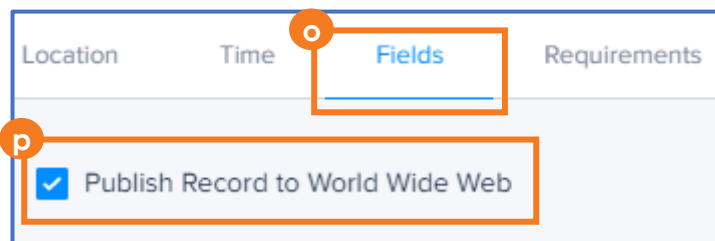
1 Creating New Volunteer Shifts (continued)

- From the top tab, select the "Requirements" section.
- You will then want to add the number of volunteers that are needed for a certain volunteer type.
- The "Tags Required" section is where you will pick the volunteer type (e.g., Vaccine Prep, Greeter) needed for that requirement. You can also add a **language tag** if the volunteer needs to speak another language.
- From there, create a new requirement for each volunteer type you need.
- Once you have completed all fields, click Save and View at the bottom right.
- You will then be able to see all details of the Job that you have just created. Note: these shifts are not posted to the world until you publish the record to the web (see P).


Note: Any details of the Job, such as volunteer types or number of volunteers needed, can be edited by clicking on the job name.

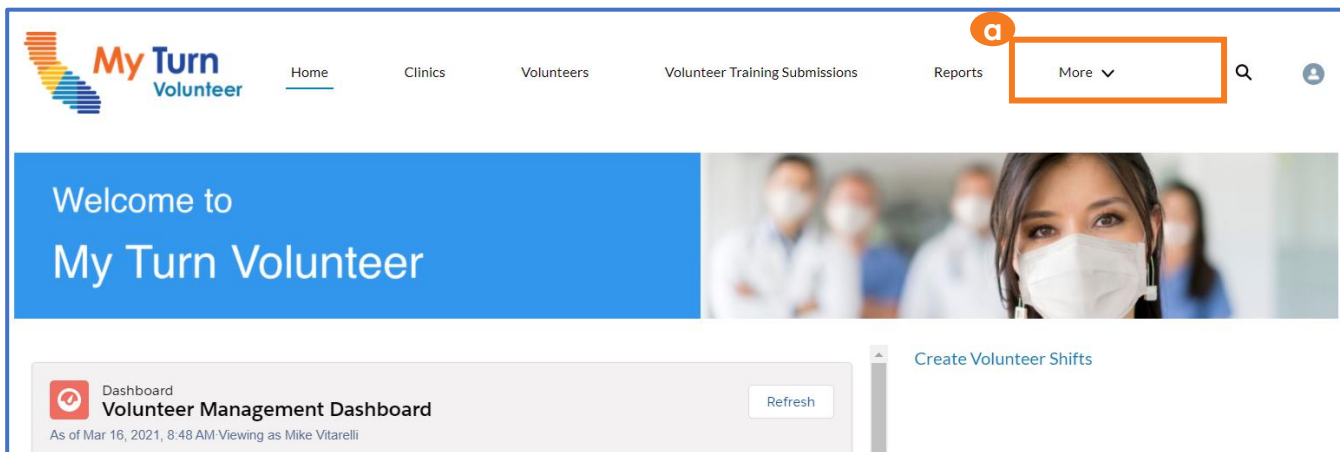
- When you are ready for volunteer to sign up, navigated to the fields tab.
- Check the Publish Record to World Wide Web and save. Now Volunteers can sign up for your clinic!



2 Cloning Existing Volunteer Shifts

Let's now see how to clone an existing job. Cloning a job allows you to copy the resources and details of that job while giving you the option to change the date and time for easier scheduling.

a. Start by clicking on **more** from the [homepage](#).

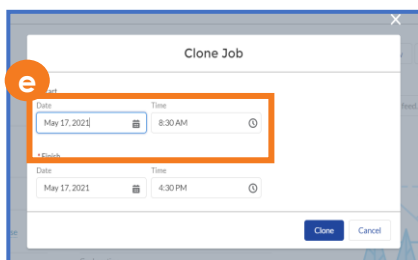
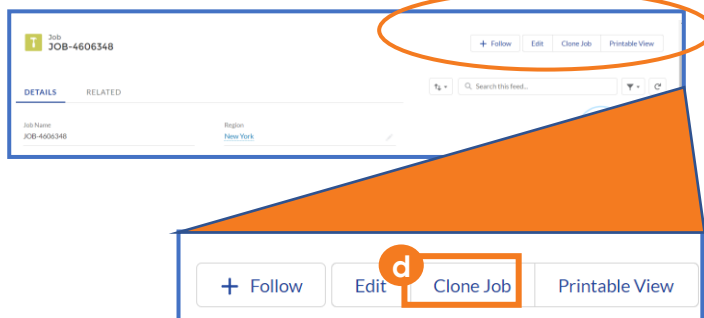
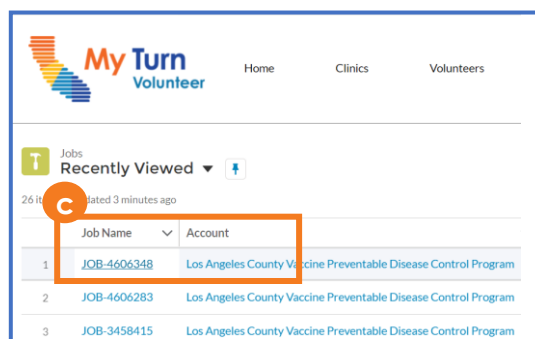
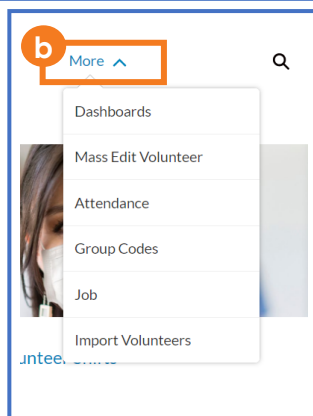


b. Click **job** from the dropdown menu.

c. Select the job you want to clone. It will open the page with job details.

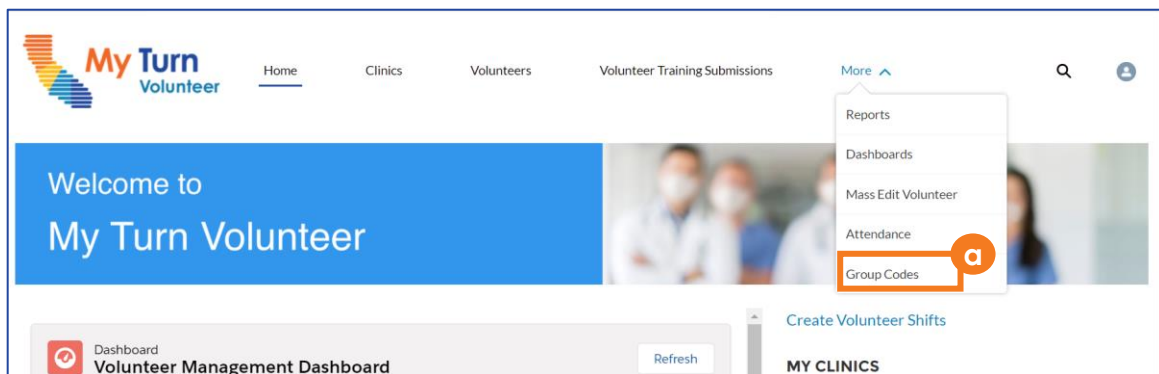
d. Click "clone job" on the details page.

e. A pop-up window will allow you to change the date and time. Click clone to save. "Success Record Created Successfully" message will appear.

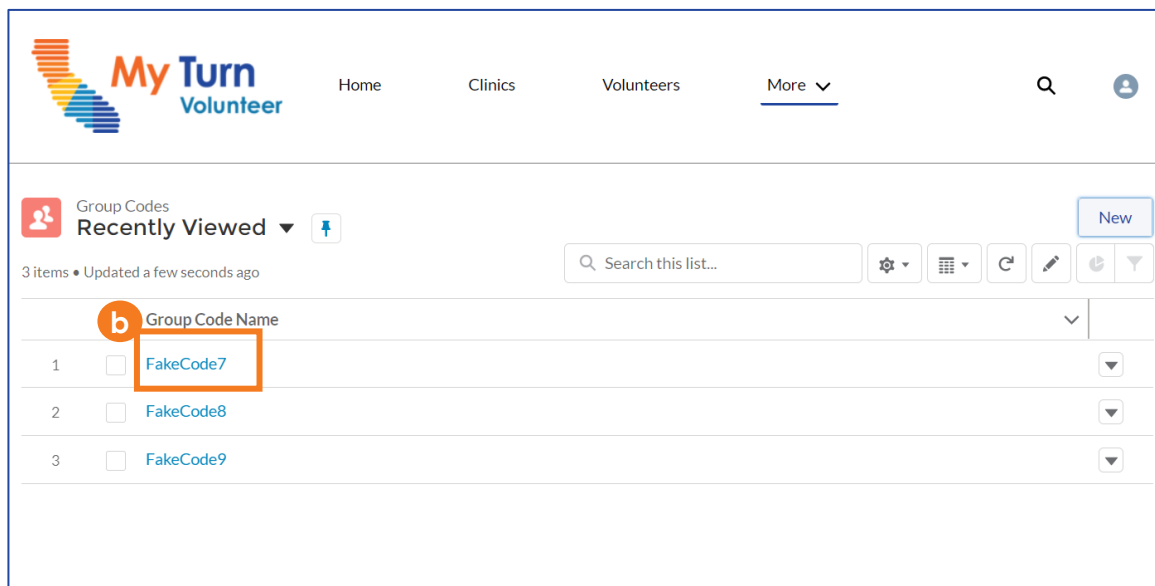


3 Group Codes

If you want specific people to be volunteers for your clinic, you can make a 10-digit Group Code that they can use. Clinic shifts that utilize a group code can only be seen by those with the code. You can use the same code for more than one clinic shift if you would like.

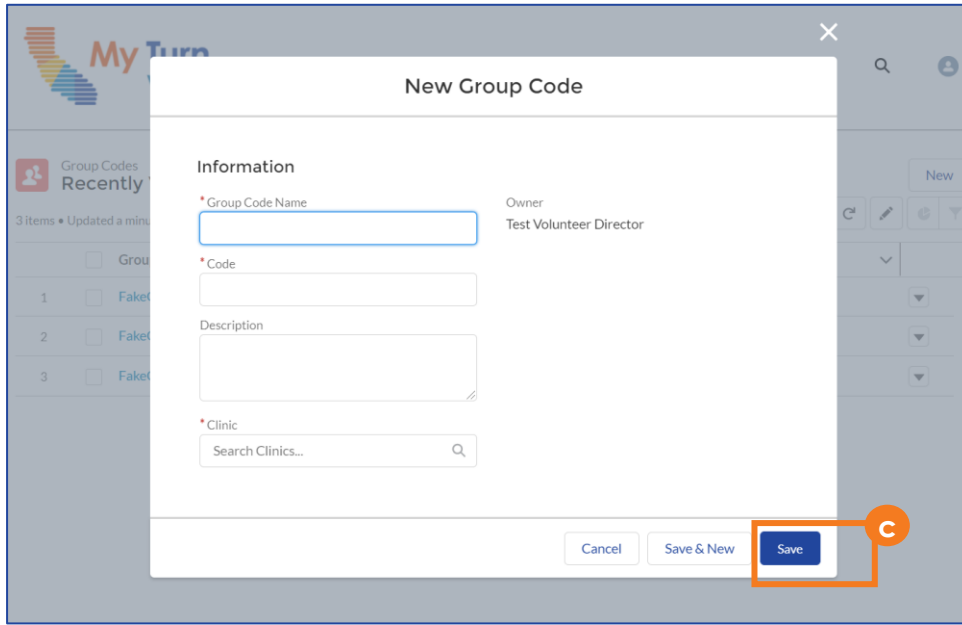


a. From the My Turn Volunteer home page, click "More" and select "Group Codes"



b. You will be taken to the My Turn group code page. If you have already created group codes, they will be listed here.

3 Group Codes (continued)



New Group Code

Information

* Group Code Name Owner: Test Volunteer Director

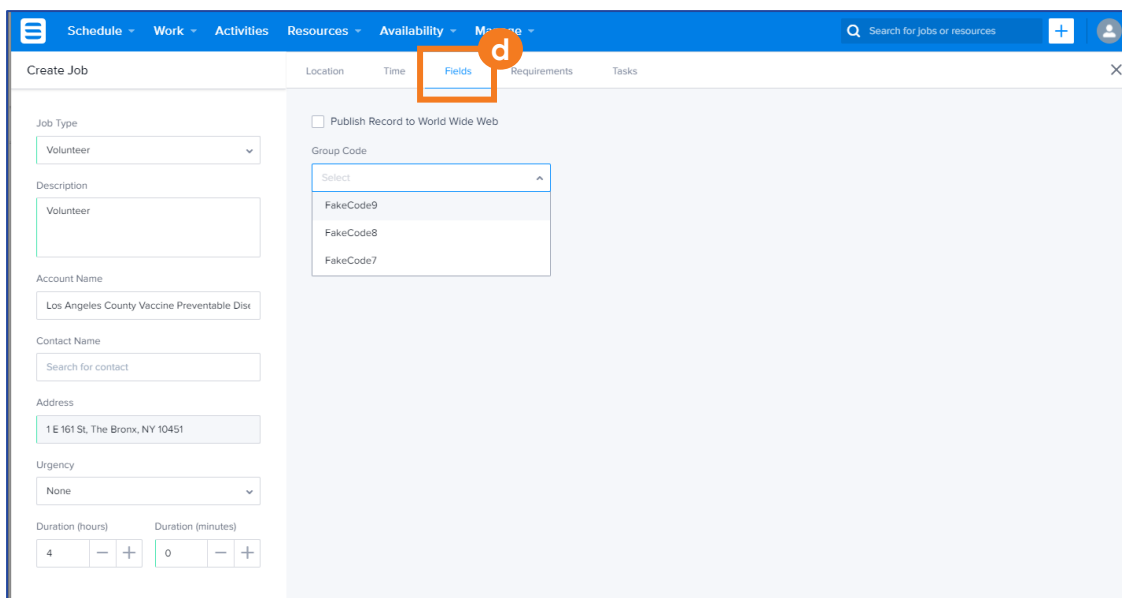
* Code

Description

* Clinic

c. After you click 'New' you will see the new group code pop up. Enter the group code name and a 10 character alpha-numeric code. For security purposes, the code must be 10 characters in length or longer.

d. The group code will now show up in Skedulo. When you create a new job, in the 'Fields' tab you will see a drop down for group codes. Select the code you want to use for that shift, then continue as usual.



Create Job

Location Time **Fields** Requirements Tasks

☐ Publish Record to World Wide Web

Group Code

Select

- FakeCode9
- FakeCode8
- FakeCode7

Job Type: Volunteer

Description: Volunteer

Account Name: Los Angeles County Vaccine Preventable Dis

Contact Name: Search for contact

Address: 1 E 161 St, The Bronx, NY 10451

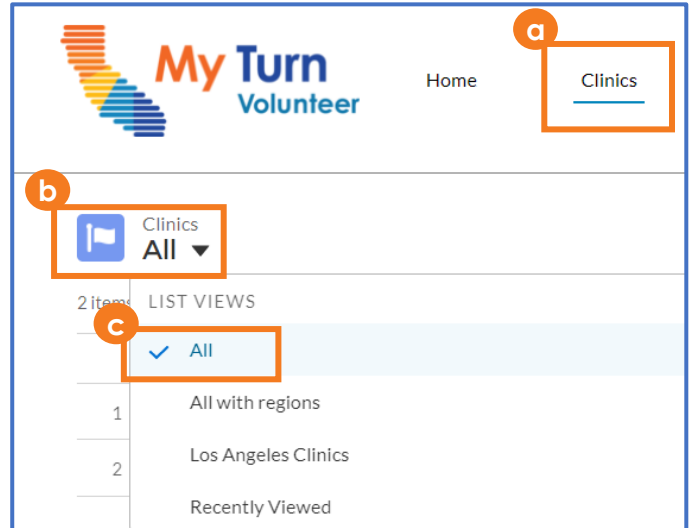
Urgency: None

Duration (hours): 4 Duration (minutes): 0

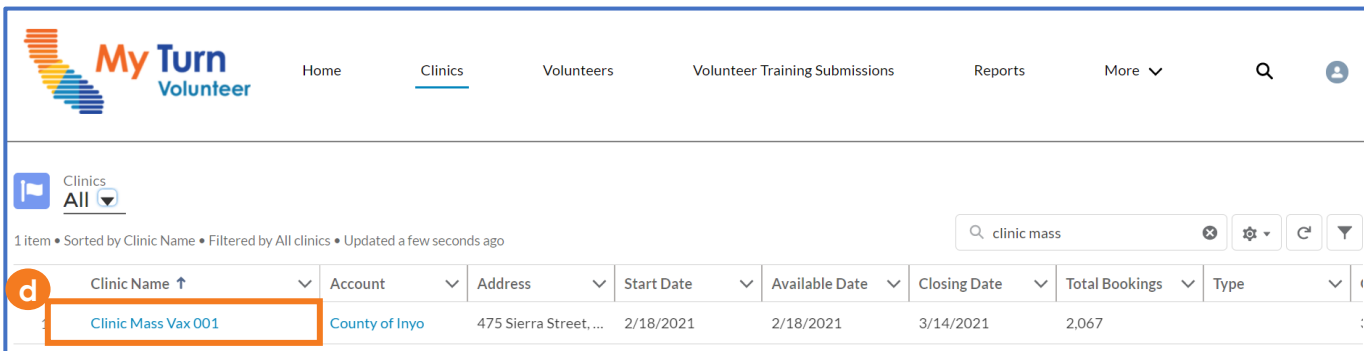
4 Viewing Clinic Details

Now that you know how to create shifts for a clinic, let's now understand how to review existing clinic details.

- At the top of the page select the "Clinics" tab.
- Click on the "Clinics" section at the top of the page to bring down the list view menu.
- Select the "All" view to see a list of all clinics, active or not.
- Click on the hyperlinked Clinic Name to view more details on the clinic.
- After clicking on the clinic name, the results will show all details about the clinic.



The screenshot shows the top navigation bar with the "Clinics" tab highlighted. Below the navigation bar, the "Clinics" section is expanded, showing a list view menu with "All" selected. The list view menu also shows "All with regions", "Los Angeles Clinics", and "Recently Viewed".



The screenshot shows the "Clinics" tab selected in the navigation bar. Below the navigation bar, the "Clinics" section is expanded, showing a list view menu with "All" selected. The list view menu also shows "All with regions", "Los Angeles Clinics", and "Recently Viewed". The table below shows the list of clinics.

Clinic Name	Account	Address	Start Date	Available Date	Closing Date	Total Bookings	Type
Clinic Mass Vax 001	County of Inyo	475 Sierra Street, ...	2/18/2021	2/18/2021	3/14/2021	2,067	



The screenshot shows the details of the clinic "Clinic Mass Vax 001". The details are organized into two columns: "DETAILS" and "RELATED".

DETAILS	RELATED
Clinic Name	Start Date
Clinic Mass Vax 001	2/18/2021
Address	Closing Date
475 Sierra Street, Bishop, CA, 93514	3/14/2021
GeoLocation	Region
37.370387, -118.3995881	California
Type	Account
	County of Inyo
Status	Owner
Assigned Volunteer Director	
Bri Chappell-McGovern	

4 Viewing Clinic Details (continued)

As you continue to scroll further down into the clinic's details, there are three sections: **Volunteer Shift Information**, **Medical Volunteer Information**, and **General Support Information**.

Volunteer Shift Information provides you easy access to data concerning the status of volunteer shifts for this specific clinic.

▼ Volunteer Shift Information	
f # of In Progress Volunteers	g # of Complete Volunteers
0	0
h # of Confirmed Shifts	i Number of Open Shifts
163	34
j # of Tentatively Filled Shifts	k # of Volunteers who did not Check-In
19	163
l # Volunteer Cancellations	
0	

- f. # of In Progress Volunteers – total number of volunteers with their **status** as **In Progress**
- g. # of Complete Volunteers – total number of volunteers with the value of **Complete** in the **status** field of their related **Job Allocation**
- h. # of Confirmed Shifts – all confirmed shifts corresponding to the timing(s) for this clinic
- i. Number of Open Shifts - remaining shifts to be filled at the clinic
- j. # of Tentatively Filled Shifts – all tentatively filled shifts in all shift timings for this clinic
- k. # of Volunteers who did not Check-In – all volunteers with the value of **Confirmed** in the **status** field of their related **Job Allocation** but did not check-in the day of their clinic (no shows/did not check-in)
- l. # of Volunteer Cancellations – the sum of all Volunteers with the value of **Declined** or **Deleted** in the **status** field of their related **Job Allocation**

4 Viewing Clinic Details (continued)

In the clinic's details, you will find the Medical Volunteer and General Support Volunteer Information. On the left side of each section, it shows the total number of resources needed for each role. On the right, it breaks down how many resources have signed up versus how many are still needed. As new volunteers register or cancel their shifts, these numbers update in real time.

Total Resources
needed for this
specific Volunteer

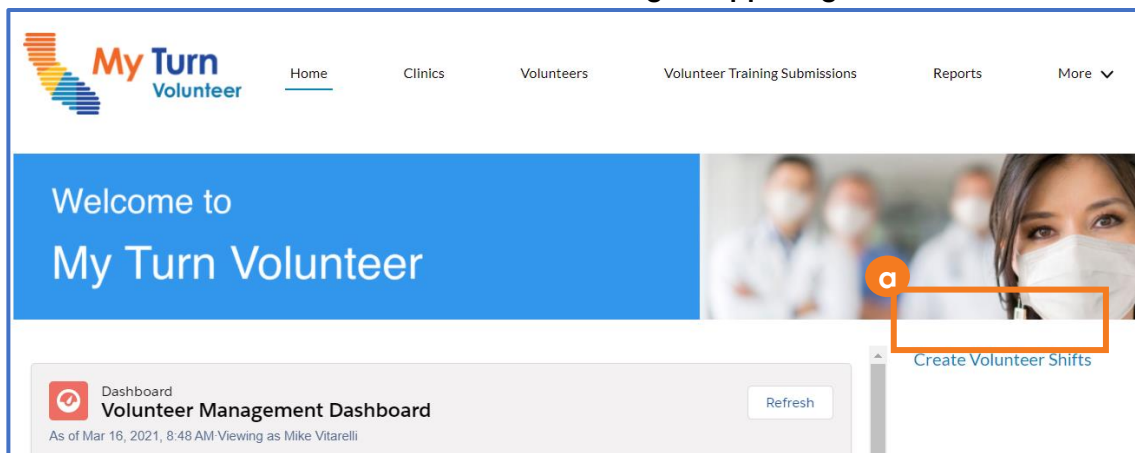
Medical Volunteer Information		
Total spots yet to be filled	# of Total Vaccine Preps	# of Vaccine Preps Needed
	16	3
		# of Vaccine Preps Filled
		13
	# of Total Vaccinators	# of Vaccinators Needed
	64	5
		# of Vaccinators Filled
		59
	# of Total Patient Observers	# of Patient Observers Needed
	24	0
		# of Patient Observers Filled
		24

Total volunteers
assigned

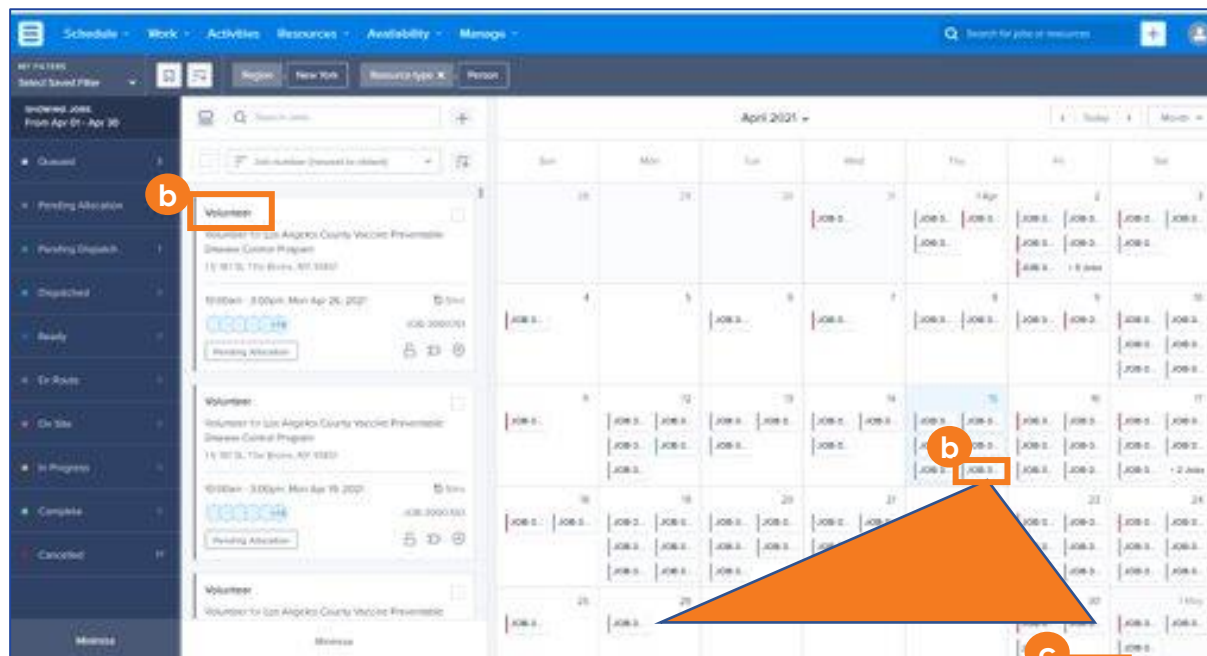
General Support Volunteer Information	
# of Total Greeter Volunteers	# of Greeter Volunteers Needed
182	96
	# of Greeter Volunteers Filled
	86
# of Total Registration Volunteers	# of Registration Volunteers Needed
182	0
	# of Registration Volunteers Filled
	182
# of Total Vol. Management Volunteers	# of Vol. Management Volunteers Needed
86	0
	# of Vol. Management Volunteers Filled
	86

5 Canceling a Shift

If your clinic no longer wants to host a shift, you can cancel the shift in Skedulo. Please note, this should only be used if a shift was created that **SHOULD NOT** exist. Canceling a shift sends a notification to volunteers that this shift is no longer happening.

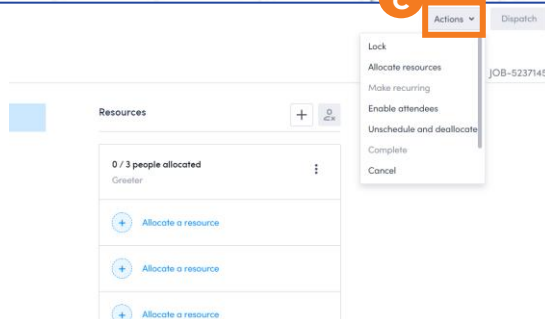


a. From the My Turn home page, click "Create Volunteer Shifts" to get to Skedulo.



b. Next, select the shift you would like to cancel from the calendar or select it from the left-hand list.

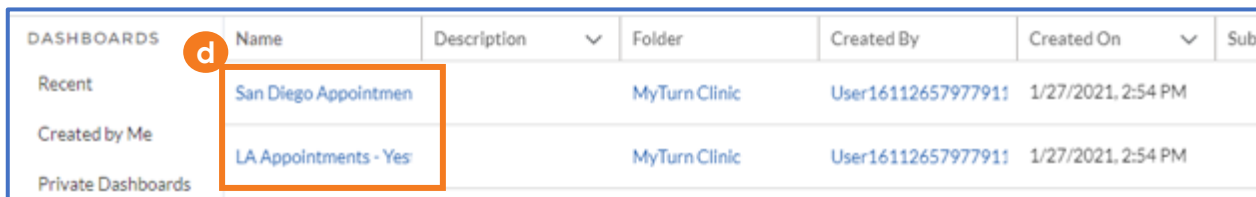
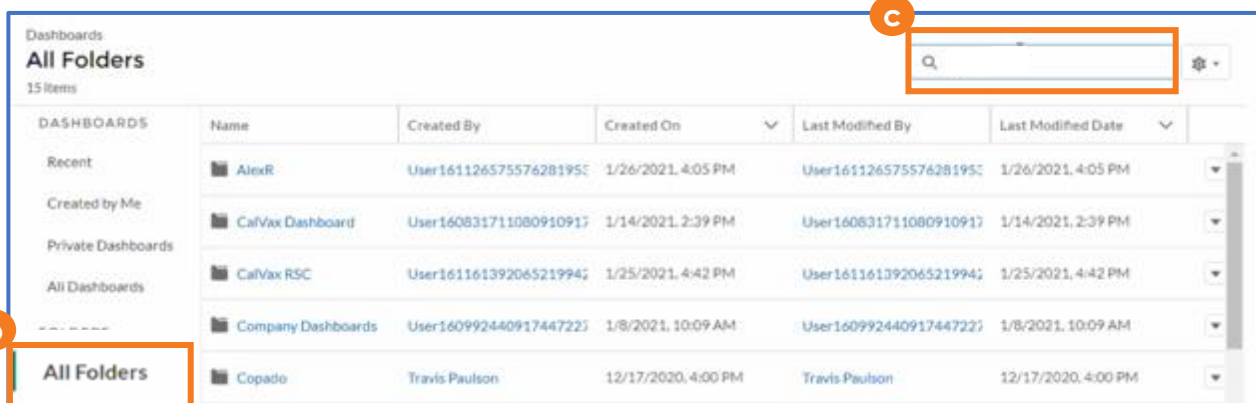
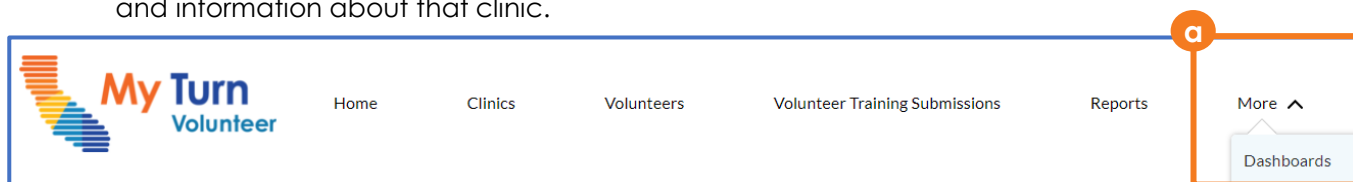
c. Click "Actions" from job detail page and select "Cancel".



6 Clinic Dashboards

Let's now see how to view the Clinic Dashboards.

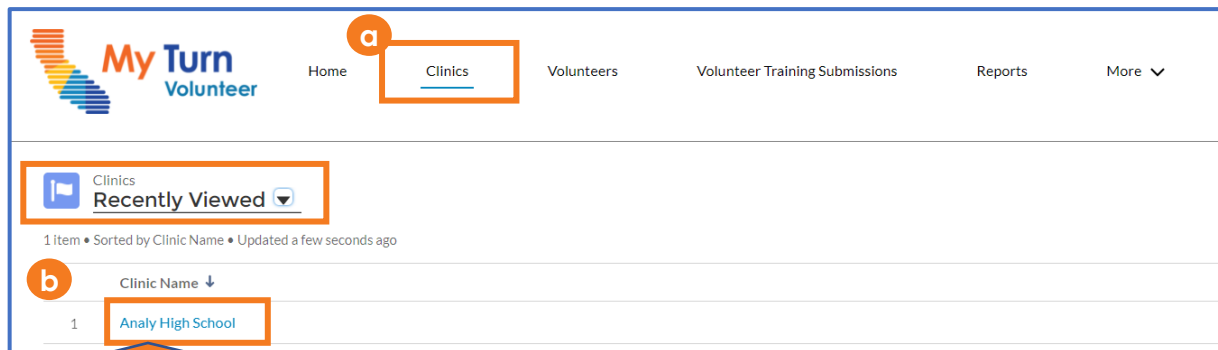
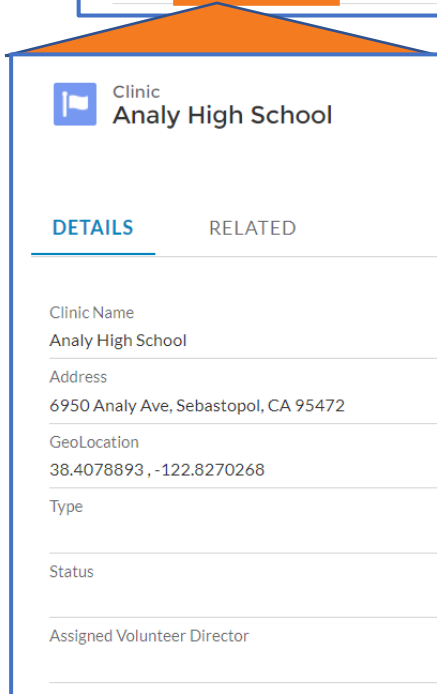
- From the top of the page, click on the "More" section to reveal the Dashboard section, and click on "Dashboards."
- Click on the "All Folders" section on the left of the screen
- In the search bar type in "**my turn clinic**"
- This will then show you available clinic dashboards named for their location.
- Clicking any of the dashboards will show you that clinic's dashboard showcasing details and information about that clinic.



7 Assigning Volunteer Managers

You can add the same volunteer manager to multiple clinics or assign them to a single clinic.

- At the top of the page, select the Clinics Tab
- You will be brought into your most recently viewed Clinics. Click the drop-down arrow to select a list view and click on the clinic you wish to assign a Volunteer Director

c. Once you are brought into the Clinic details, you will see three buttons: Add User, Remove Users, and Send Email. Click "Add User"

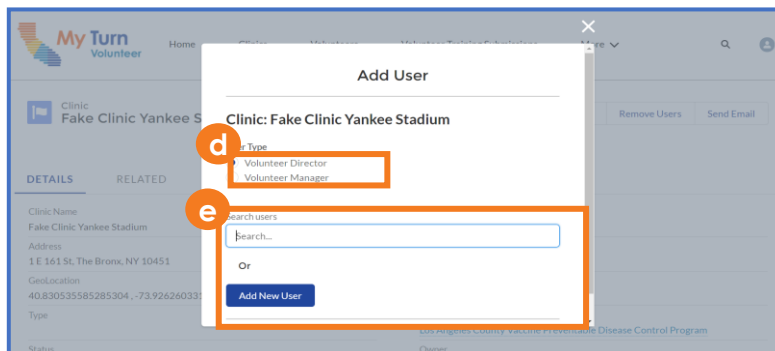
d. A pop window will appear:
Check "volunteer manager"

e. Then you have two options:

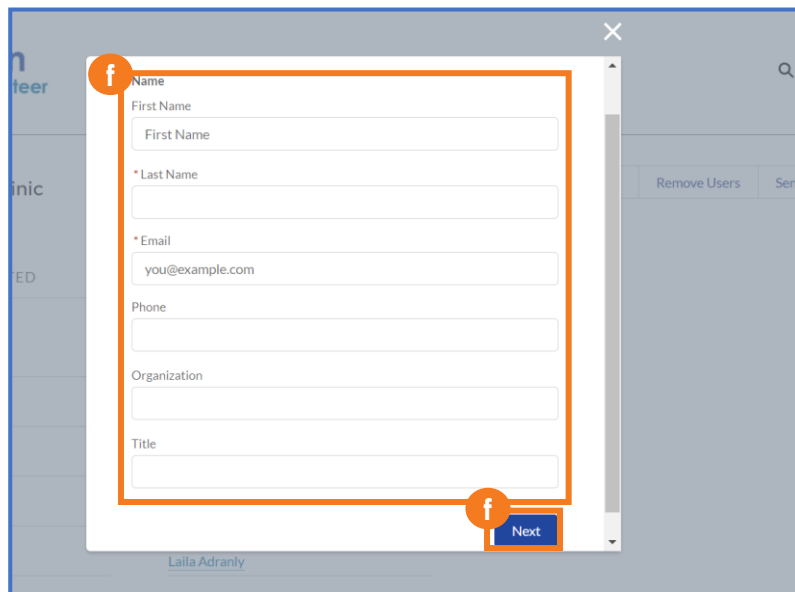
- search for an existing volunteer manager (must be assigned at another clinic as a Volunteer Manager) by typing their name in "search user" field

OR

- Click "Add New User"



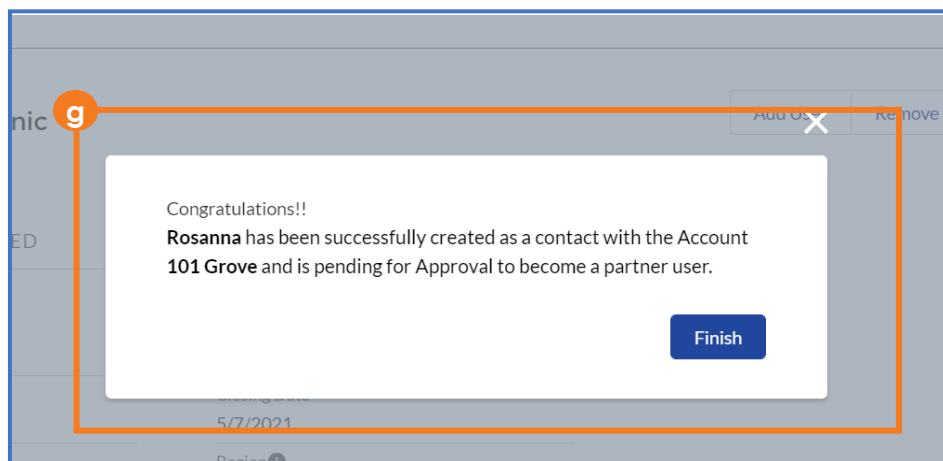
7 Assigning Volunteer Managers (continued)



- f. Fill in
- First Name
 - Last Name
 - Email
 - Phone Number
 - Organization
 - Title

Then click NEXT.

- g. A message will appear stating " (volunteer manager name) has been successfully created as a contact with the account (clinic name) and is pending for Approval to become a partner user."

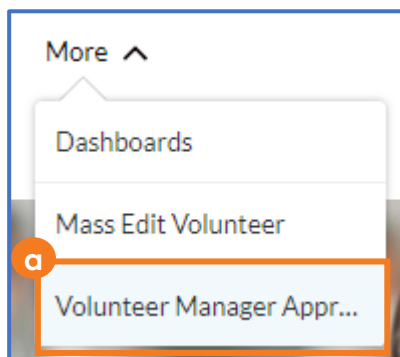


Click Finish and you will go back to the clinic details.




8 Approving Volunteer Managers

Volunteer Managers must first be approved by either the Volunteer Director or their designated State Volunteer Officer before gaining access to My Turn Volunteer. Volunteer Managers are initially created within a clinic's details, just like Volunteer Directors. Here is how to approve Volunteer Managers:



- Under the "More" tab in the top navigation bar, click Volunteer Manager Approvals.



- Here all State Volunteer Officers have visibility to all pending Volunteer Managers.
- In order to approve a Volunteer Manager, click the checkbox to the left of their name and click the "Approve" button. If you want to approve multiple Volunteer Managers, you can select multiple checkboxes or click the checkbox next to "Name" which selects all.


Home Clinics Volunteers More  

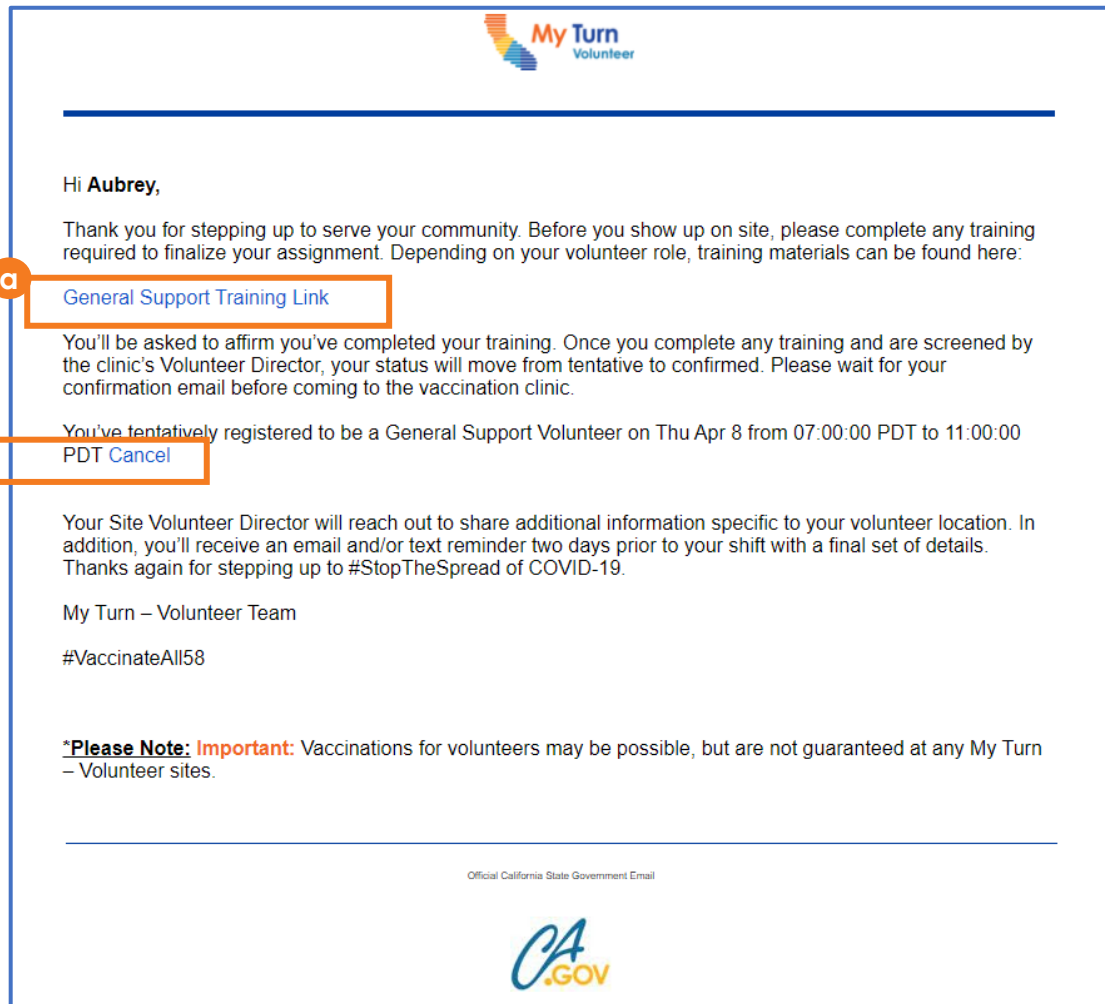
Volunteer Managers for Approval

<input type="checkbox"/>	Name	Phone	Email	Partner User Status	Clinic
<input checked="" type="checkbox"/>	Tim Villanueva	7608737868	tvilluenva@inyocounty.us	Pending Approval	Clinic Mass Vax 001
<input type="checkbox"/>	Mark Skidmore		mark.skidmore@cv.ca.gov	Pending Approval	Clinic Mass Vax 001

1 Volunteer Experience Overview - Volunteer Email

This is the email that the Volunteers will get. It includes links to the training previously mentioned. From here, volunteers can get their training done. If a volunteer is no longer able to come to their shift, they can cancel their shift from this email as well.



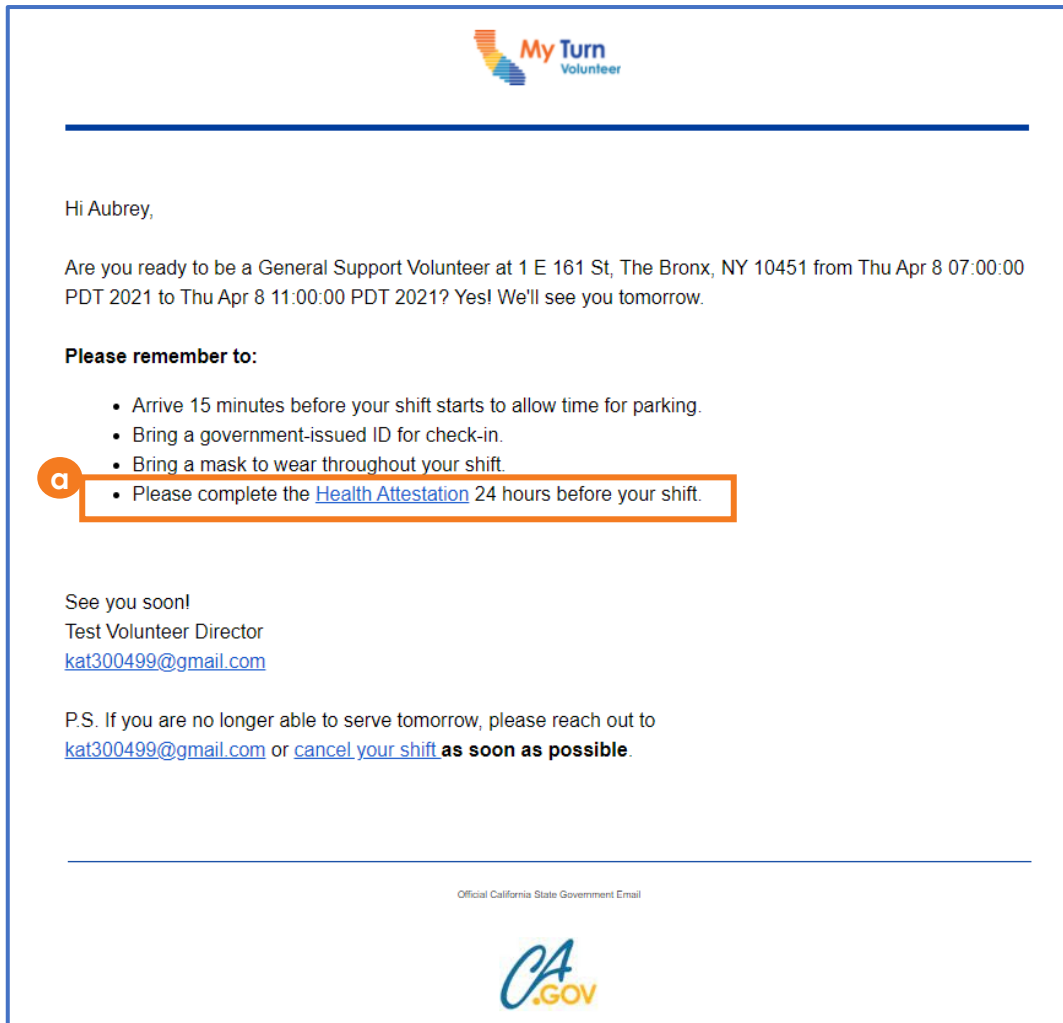
a. General Support training link – this takes the volunteer to safety information as recommended by the CDC.

b. Cancellation link – if a volunteer would like to cancel their shift, they can click this link and their shift will be automatically canceled.

1

Volunteer Experience Overview – Health Attestation

Before their shift, the volunteers will be sent an automatic email that includes a Health Attestation form. This form must be completed 24 hours before their shift.



The screenshot shows an email from My Turn Volunteer. At the top is the My Turn Volunteer logo. Below it is a horizontal line. The email body starts with "Hi Aubrey," followed by a paragraph: "Are you ready to be a General Support Volunteer at 1 E 161 St, The Bronx, NY 10451 from Thu Apr 8 07:00:00 PDT 2021 to Thu Apr 8 11:00:00 PDT 2021? Yes! We'll see you tomorrow." Then, it says "Please remember to:" followed by a bulleted list: "• Arrive 15 minutes before your shift starts to allow time for parking.", "• Bring a government-issued ID for check-in.", "• Bring a mask to wear throughout your shift.", and "• Please complete the [Health Attestation](#) 24 hours before your shift." The last bullet point is highlighted with an orange box and a callout 'a'. Below the list is "See you soon!" followed by "Test Volunteer Director" and the email address "kat300499@gmail.com". Then, "P.S. If you are no longer able to serve tomorrow, please reach out to [kat300499@gmail.com](#) or [cancel your shift](#) as soon as possible." At the bottom, there is a horizontal line, the text "Official California State Government Email", and the "CA.GOV" logo.

My Turn
Volunteer

Hi Aubrey,

Are you ready to be a General Support Volunteer at 1 E 161 St, The Bronx, NY 10451 from Thu Apr 8 07:00:00 PDT 2021 to Thu Apr 8 11:00:00 PDT 2021? Yes! We'll see you tomorrow.

Please remember to:

- Arrive 15 minutes before your shift starts to allow time for parking.
- Bring a government-issued ID for check-in.
- Bring a mask to wear throughout your shift.
- Please complete the [Health Attestation](#) 24 hours before your shift.

See you soon!

Test Volunteer Director
kat300499@gmail.com

P.S. If you are no longer able to serve tomorrow, please reach out to kat300499@gmail.com or [cancel your shift](#) as soon as possible.


Official California State Government Email

CA.GOV

a. Health Attestation Link – this link will take the volunteer to the Health Attestation form. This must be filled out 24 hours before their shift. The Health Attestation form is on the next page; it asks questions about the health of the volunteer.

1 Volunteer Experience Overview – Health Attestation Form

When a Volunteer clicks the Health Attestation link, they will be brought to this form. There are questions as recommended by the CDC to make sure that volunteers are in good health. The volunteer will then sign their personal information so that we can track that they have completed the health attestation.


Home

Health Attestation Questions regarding COVID-19

Please complete this Health Attestation 24 hours before your shift

- Have you experienced any of the following symptoms in the past 24 hours:
 - Fever or chills
 - Cough
 - Shortness of breath or difficulty breathing
 - Fatigue
 - Muscle or body aches
 - Headache
 - New loss of taste or smell
 - Sore throat
 - Congestion or runny nose
 - Nausea or vomiting
 - Diarrhea

No Yes
- Have you been in close physical contact in the last 14 days with:
 - Anyone who is known to have laboratory-confirmed COVID-19? OR
 - Anyone who has any symptoms consistent with COVID-19?
 - Close physical contact is defined as being within 6 feet of an infected/symptomatic person for a cumulative total of 15 minutes or more over a 24-hour period starting from 48 hours before illness onset (or, for asymptomatic individuals, 48 hours prior to test specimen collection).

IMPORTANT: ANSWER "NO" IF YOU ARE FULLY VACCINATED

No Yes
- Are you isolating or quarantining because you may have been exposed to a person with COVID-19 or are worried that you may be sick with COVID-19?

No Yes
- Are you currently waiting on the results of a COVID-19 test?

IMPORTANT: ANSWER "NO" IF YOU ARE WAITING ON THE RESULTS OF A PRE-TRAVEL COVID-19 TEST.

No Yes
- Have you traveled in the past 10 days?

Travel is defined as any trip that is overnight AND on public transportation (plane, train, bus, Uber, Lyft, cab, etc.) OR any trip that is overnight AND with people who are not in your household.

No Yes

Personal Information

*First Name

*Last Name

*Email

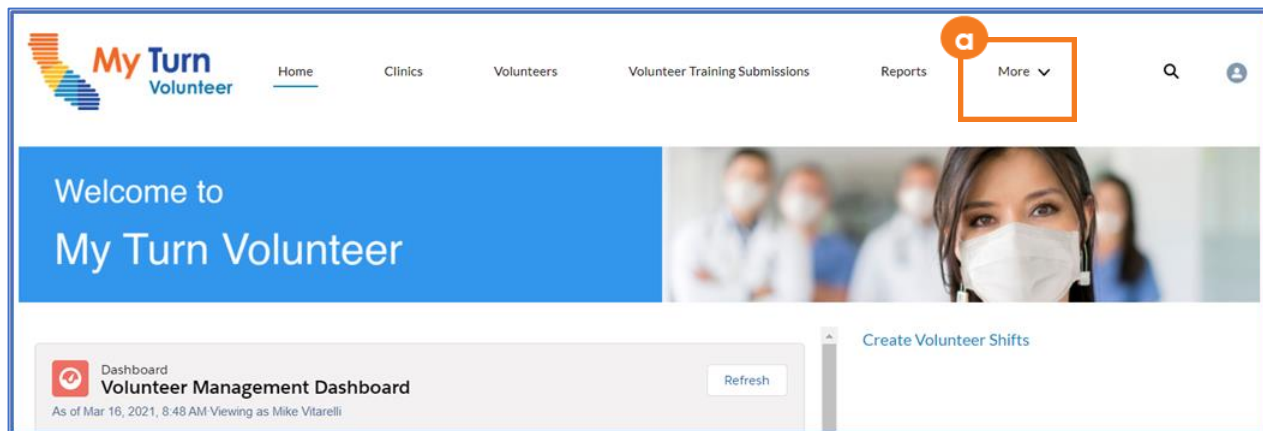
*Zip Code

Submit

2 Import Volunteer Data Through CSV Files

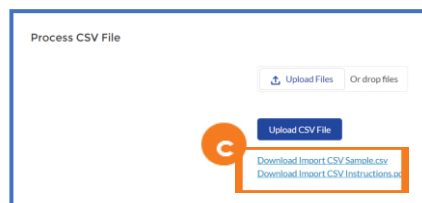
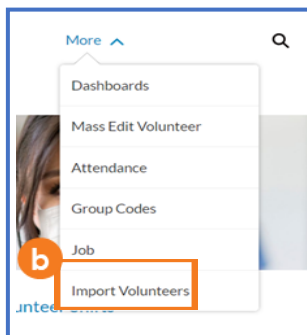
You can now import volunteer data using a CSV file with specific data so that it can be entered into My Turn Volunteer, making it easier and faster for your volunteers to register.

a. Click **more** on the top.



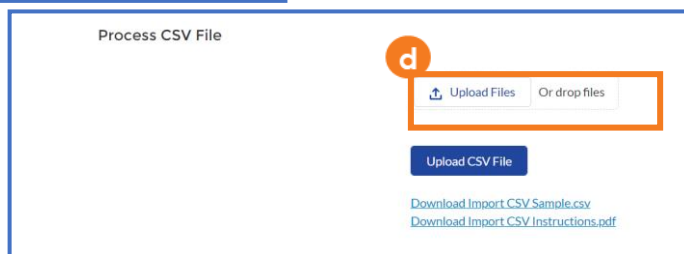
b. Click on import volunteers from drop down menu.

c. You can click on "Download Import CSV sample" link to see a template with exact requirements for the CSV file. Click "Download Import CSV Instructions" link for further instructions.



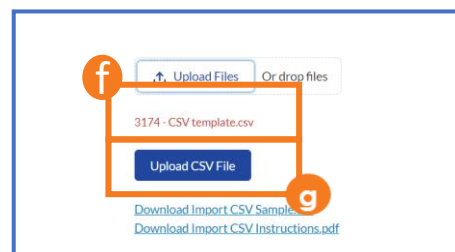
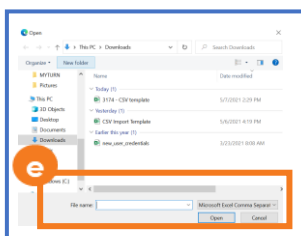
d. On the process CSV file, click upload CSV file or drop file.

e. If you upload a CSV file instead of dropping the file in, select the file from your file manager.

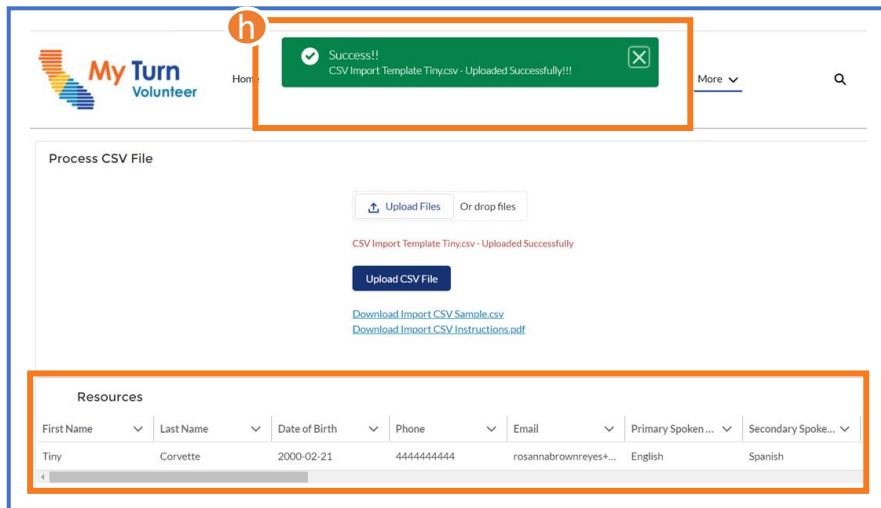


f. You will see your file in red below upload files.

g. Click "upload CSV file" to upload to My Turn Volunteer.



2 Import Volunteer Data Through CSV Files (contd)



h. Success!! CSV Import Template Tiny.csv - Uploaded Successfully!!!

Process CSV File

Upload Files Or drop files

CSV Import Template Tiny.csv - Uploaded Successfully

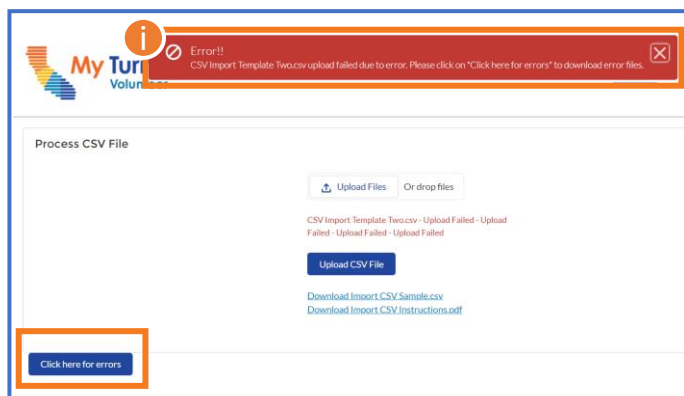
Upload CSV File

[Download Import CSV Sample.csv](#)
[Download Import CSV Instructions.pdf](#)

First Name	Last Name	Date of Birth	Phone	Email	Primary Spoken ...	Secondary Spoke...
Tiny	Corvette	2000-02-21	4444444444	rosannabrownreyes+...	English	Spanish

h. If the file was uploaded successfully, you will see a "Success!! File name.csv-Uploaded Successfully!!!" message in green and the input under resources.

i. If the file was not uploaded successfully, you will see an error message "Error!! (filename). csv upload failed due to error. Please click on "Click here for errors" to download error files."



i. Error!! CSV Import Template Two.csv upload failed due to error. Please click on "Click here for errors" to download error files.

Process CSV File

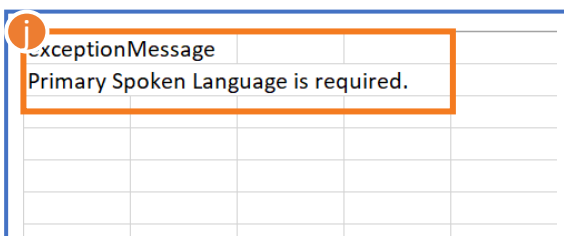
Upload Files Or drop files

CSV Import Template Two.csv - Upload Failed - Upload Failed - Upload Failed - Upload Failed - Upload Failed

Upload CSV File

[Download Import CSV Sample.csv](#)
[Download Import CSV Instructions.pdf](#)

Click here for errors

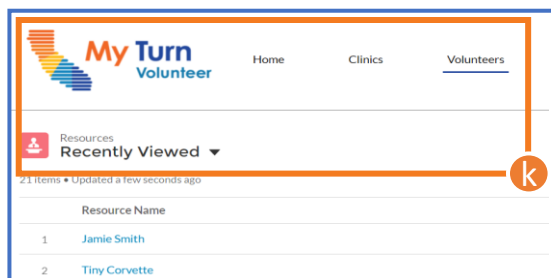


j. ExceptionMessage

Primary Spoken Language is required.

J. Click on "Click here for errors" to open and/or download the error csv file. Scroll all the way to the right to find the exact error.

k. You can view the resource upload in the recently view section of the Volunteer tab.



My Turn Volunteer

Home Clinics Volunteers

Resources

Recently Viewed

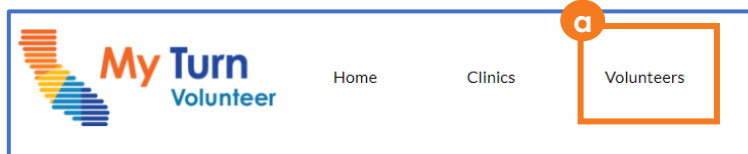
21 Items • Updated a few seconds ago

	Resource Name
1	Jamie Smith
2	Tiny Corvette

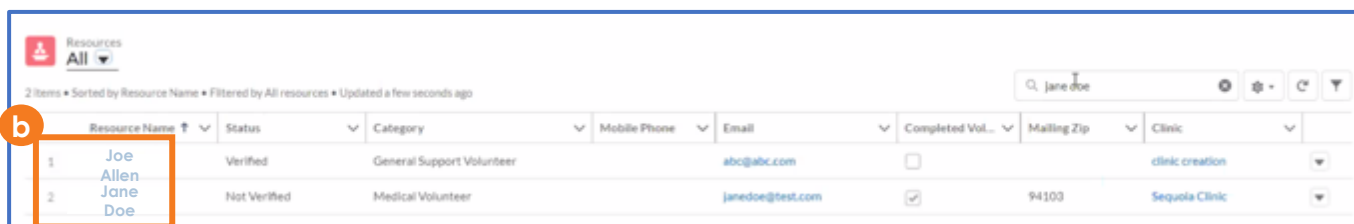
3 Reviewing Volunteers

As a Volunteer Director, you can review tentative volunteer registrations. The details on the volunteer profiles will be used to verify volunteers and change their status in the system to show: **Verified, Not Verified, or Verification Failed.** Let's see how this is done on the site and what each status does!

a. At the top of the page select the "Volunteers" tab.



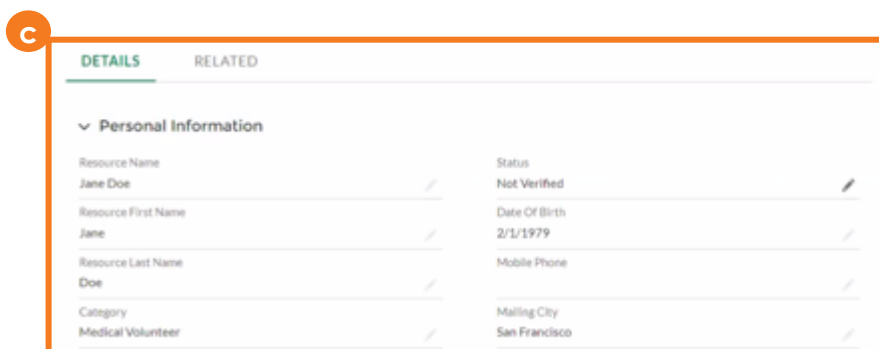
b. You will now be able to see a list of potential volunteers. Click on the name of a volunteer to see more details.



The screenshot shows a table of volunteer resources. A red box labeled 'b' highlights the first row of the table, which contains the name 'Joe Allen Jane Doe'.

Resource Name	Status	Category	Mobile Phone	Email	Completed Vol...	Mailing Zip	Clinic
1 Joe Allen Jane Doe	Verified	General Support Volunteer		abc@abc.com	<input type="checkbox"/>		clinic creation
2 Jane Doe	Not Verified	Medical Volunteer		janedoe@test.com	<input checked="" type="checkbox"/>	94103	Sequoia Clinic

c. Inside the details of the volunteer, you will be able to view their personal information and make edits by clicking the pencil icon next to any item.

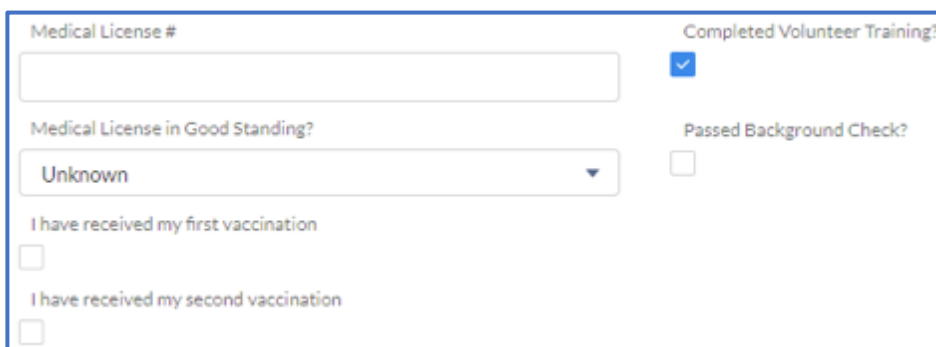


The screenshot shows the 'DETAILS' tab of a volunteer's profile. A red box labeled 'c' highlights the 'Personal Information' section, which includes fields for Name, Date of Birth, Mobile Phone, and Category, each with a pencil icon for editing.

Personal Information	
Resource Name	Jane Doe
Resource First Name	Jane
Resource Last Name	Doe
Category	Medical Volunteer
Status	Not Verified
Date Of Birth	2/1/1979
Mobile Phone	
Mailing City	San Francisco

It is important to note that the medical license should be pre-populated from the volunteer's entry. However, the Volunteer Director may manually input the Medical License if needed by clicking the pencil icon and editing the field. The "Completed Volunteer Training?" and "Passed Background Check?" check boxes are auto filled based on the volunteer passing their background check or completing their training, respectively.

The Volunteer Director is ultimately responsible for checking the volunteer details and determining the Status based on these requirements.



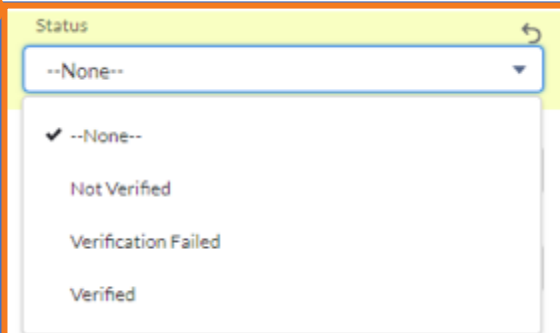
The screenshot shows the bottom section of the volunteer details page. It includes a 'Medical License #' field, a 'Medical License in Good Standing?' dropdown menu, and two checkboxes: 'Completed Volunteer Training?' (checked) and 'Passed Background Check?' (unchecked). Below these are two more checkboxes for vaccination status.

Medical License #	Completed Volunteer Training?
	<input checked="" type="checkbox"/>
Medical License in Good Standing?	Passed Background Check?
Unknown	<input type="checkbox"/>
I have received my first vaccination	
<input type="checkbox"/>	
I have received my second vaccination	
<input type="checkbox"/>	

3 Reviewing Volunteers (continued)

- d. The Status section will be used to determine if a candidate is verified, not verified, or verification failed. The status is determined by the Volunteer Director based on the details of the volunteer. Refer to table below to see what each status means for volunteers.

d



	Medical Volunteer	General Support Volunteer
Verified	Medical License Check Passed Training Completed	Background Check Passed Training Completed
Not Verified	Awaiting Volunteer Details (Medical License, Training, Background check)	Awaiting Volunteer Details (Training, Background check)
Verification Failed	Did not receive details Auto Shift Cancellation Email sent to volunteer	Did not receive details Auto Shift Cancellation Email sent to volunteer



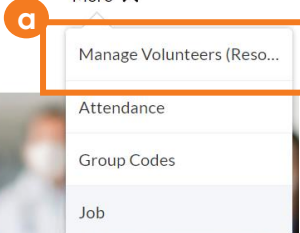
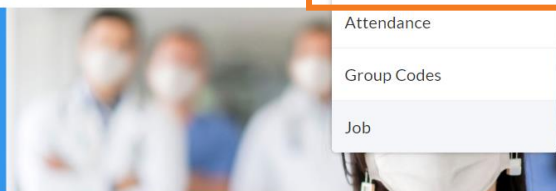
Note: An automatic reminder to complete the required Volunteer Training will be sent to tentative volunteers' emails 72 hours before their shift. No action is required.

4 Mass Edit Volunteers

Making updates to volunteers individually can be tasking. Thankfully, there is an easier way to make changes to multiple to volunteers using the Mass Edit Volunteer tab. Here's how:

- a. First, navigate to the Mass Edit Volunteer tab by opening the drop-down list in the More tab.

a

4 Mass Edit Volunteers (continued)

b. Click the pencil icon and the field will allow you to update the field to make the correction.

	Resource Na...	User	Status	Category	Mobile Phone	Email	Completed
1	Test Volunteer 8		Not Verified	General Support ...	123456789	kankshit.ad...	true
2	Test Volunteer 4		Not Verified	Medical Volunteer	1008675309		

c. You may repeat this process for as many fields as you need. Once you are done, you'll see all the fields you updated highlighted in yellow. **Click "Save" at the bottom of the page to ensure these changes are saved to the system.**

	Resource Na...	User	Status	Category	Mobile Phone	Email	Completed ...	Mailing Zip
1	Test Volunteer 8		Not Verified	General Support ...	123456789	kankshit.ad...	true	900344
2	Test Volunteer 4		Not Verified	Medical Volunteer	1008675309	kankshitadh...	true	90066

Cancel

Save

5 Emailing Volunteers

Communicating with your volunteers is critical; we want to ensure they are well informed and prepared to serve their shift. When it's time to reach out to the volunteers, navigate to the clinic details and follow these steps:

Clinic
Fake Clinic Madison Square Garden

Add User

Remove Users

Send Email

DETAILS

RELATED

Send Email



Select Dates

Feb 20, 2021

2021-02-20 X

select any status if required

☒ Confirmed

☐ Tentative

☐ Verification Failed

Next

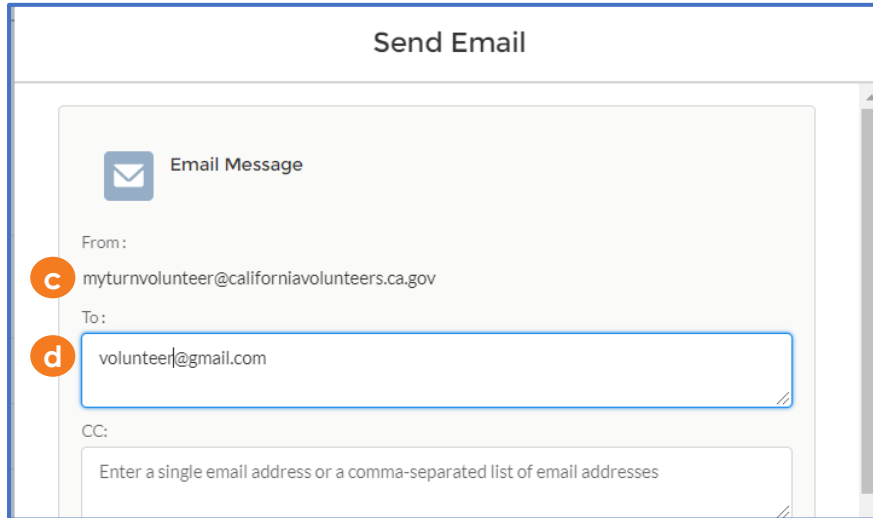
Cancel

a. Navigate to the Clinics tab and select the clinic you want to reach out on behalf of, on the right-hand side, there is a drop-down arrow that shows "Send Email." Click "Send Email" and the email widget will appear.

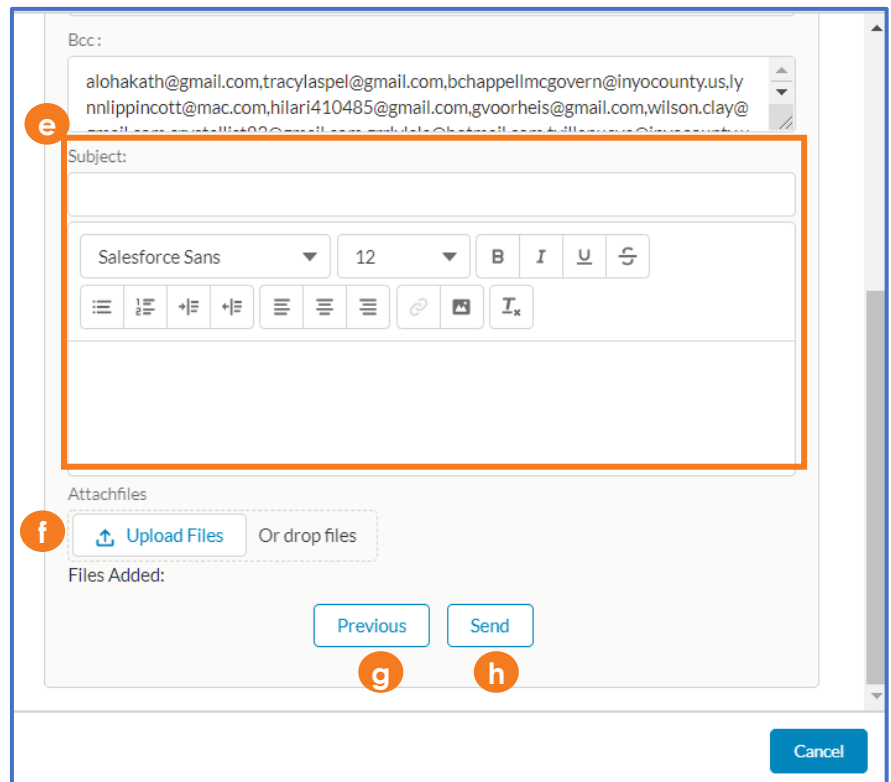
b. Before you can enter your message, you must first select your audience. This is done by clicking the calendar icon and choosing the date(s) of the shifts you wish to communicate about. You can also choose to segment them by: Confirmed, Tentative, and Verification Failed. Once that is done, click "Next."

5 Emailing Volunteers (continued)

- c. You are then brought to the next step in the email creation process and will see all the volunteers' emails populated in the BCC section. Additionally, the email associated to your My Turn Volunteer user account in the To section.
- d. By default, all emails will be sent out from myturnvolunteer@californiavolunteers.ca.gov.



- e. Enter a subject you think will capture your audience's attention and enter your content below.
- f. You have the option of attaching multiple PDFs that you wish to share with the volunteers.
- g. If you need to change your audience, you can click "Previous" to return to the calendar selection
- h. Once you have entered all your content, make sure to review for spelling errors and you have uploaded the correct attachments. Then, when you are ready, click "Send."



Section 4: Preparation the Week of the Clinic

Congratulations! You now have the knowledge to operate as a Volunteer Director in My Turn Volunteer! In the next few steps, we will cover what to do 72 Hours, 48 hours, and 24 hours before the clinic, as well as the responsibilities during the day of the clinic.



Curriculum Overview:



Volunteer Management Dashboard

- Welcome Email
- View Volunteer Management Dashboard
- Reporting



Clinic Management

- Access Skedulo to manage volunteer shifts
- Clone existing shifts/jobs from My Turn Volunteer portal
- Group Codes
- View clinic details
- Clinic Dashboards
- Assigning Volunteer Managers
- Approving Volunteer Managers



Volunteer Resource Management

- Volunteer Experience Overview
- Import CSV files with Volunteer data
- Edit and vet Volunteer records
- Visibility to Volunteer Training Submissions
- Mass Update Volunteers
- Send bulk emails to Volunteers

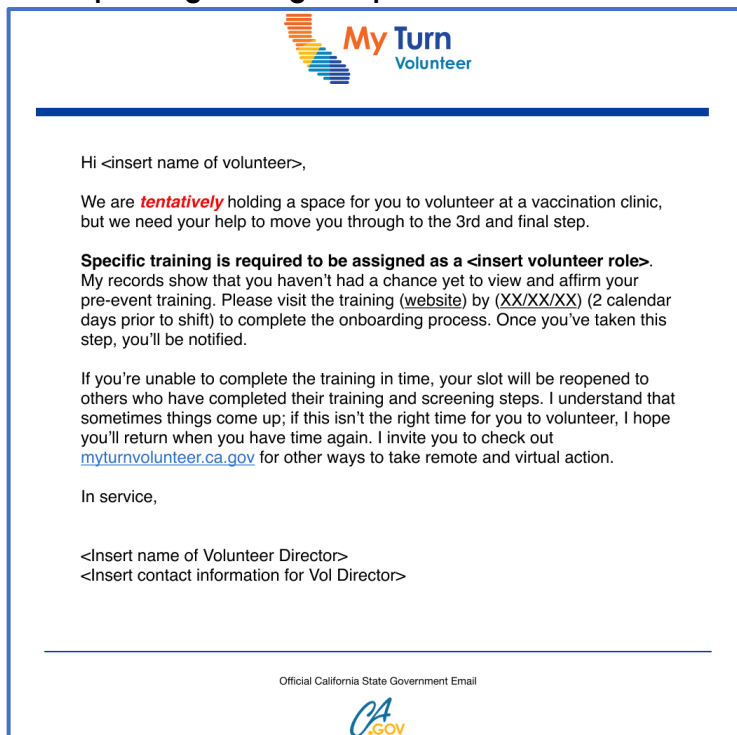
Next

Preparation The Week Of The Clinic

- 72 hours before the clinic
- 48 hours before the clinic
- 24 hours before shift
- Day of the clinic

1 72 Hours Before the Clinic

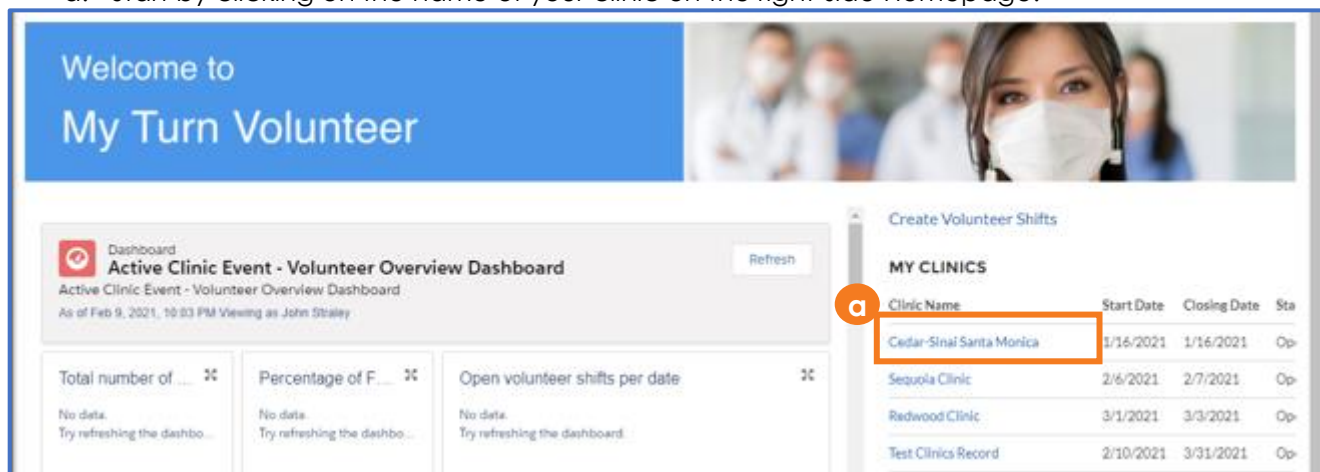
At this point, most shifts should have been filled and volunteers should have completed their respective trainings. If they have not, an email is automatically sent out 72 hours prior to the clinic to all volunteers who are pending training completion.



2 48 Hours Before the Clinic

You will continue to review the dashboards and reports to observe how volunteer shifts are filling up for clinics. 48 hours before the Clinic begins, we recommend you cancel all tentative volunteer registrations with pending trainings to make room for new volunteers. Let's see how this is done:

a. Start by clicking on the name of your clinic on the right-side Homepage.



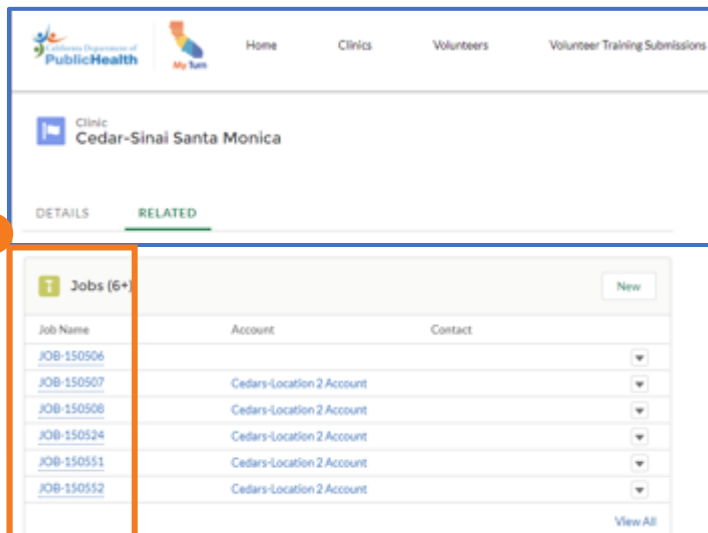
2 48 Hours Before the Clinic (continued)

b. On the Clinic details page click on the "Related" tab to view the Job Name that you will look up.

c. Click on the "Details" tab and then on the "Click Here" under the Create Volunteer Shifts section to enter Skedulo.

d. Once on Skedulo, type on the Job Name in the search bar.

e. When you find the Job Name you are looking for, click on the section for the Job.



Public Health My Turn Home Clinics Volunteers Volunteer Training Submissions

Clinic Cedar-Sinai Santa Monica

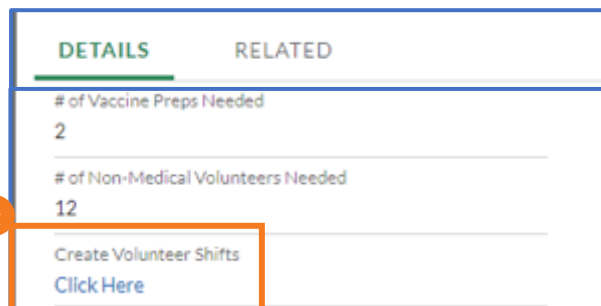
DETAILS RELATED

b

Jobs (6+)

Job Name	Account	Contact
JOB-150506		
JOB-150507	Cedars-Location 2 Account	
JOB-150508	Cedars-Location 2 Account	
JOB-150524	Cedars-Location 2 Account	
JOB-150551	Cedars-Location 2 Account	
JOB-150552	Cedars-Location 2 Account	

View All



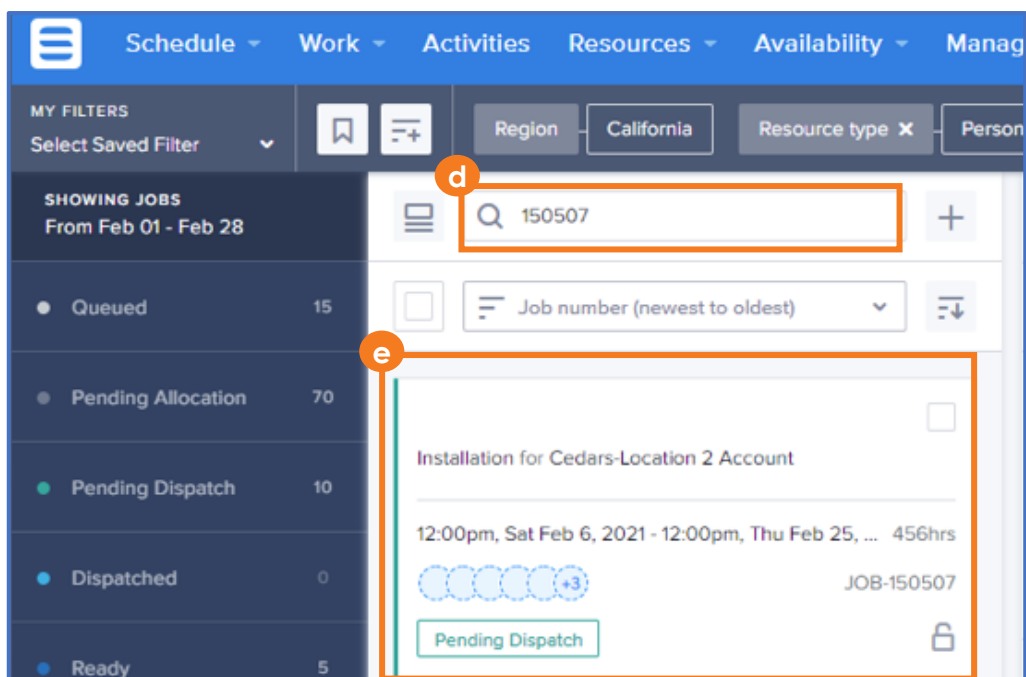
DETAILS RELATED

of Vaccine Preps Needed
2

of Non-Medical Volunteers Needed
12

c

Create Volunteer Shifts
Click Here



Schedule Work Activities Resources Availability Manag

MY FILTERS
Select Saved Filter

Region California Resource type X Person

SHOWING JOBS
From Feb 01 - Feb 28

Queued 15

Pending Allocation 70

Pending Dispatch 10

Dispatched 0

Ready 5

d

150507

Job number (newest to oldest)

e

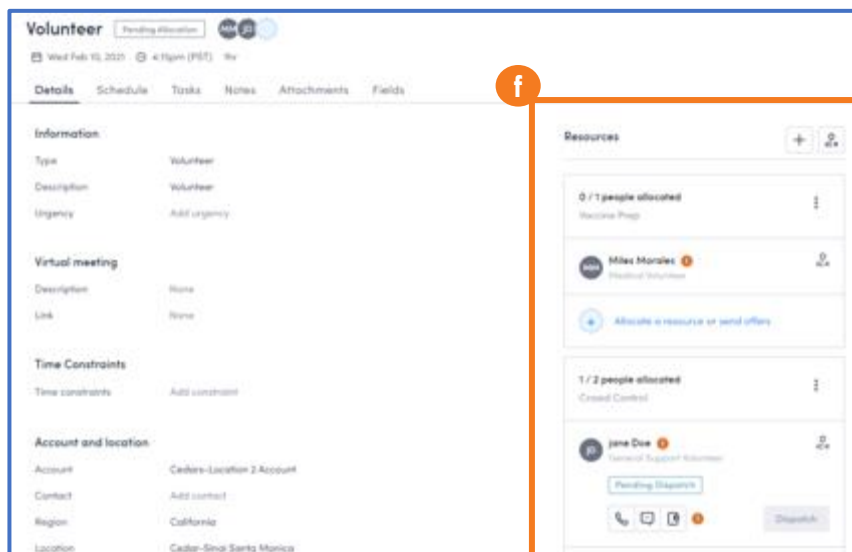
Installation for Cedars-Location 2 Account

12:00pm, Sat Feb 6, 2021 - 12:00pm, Thu Feb 25, ... 456hrs

Pending Dispatch

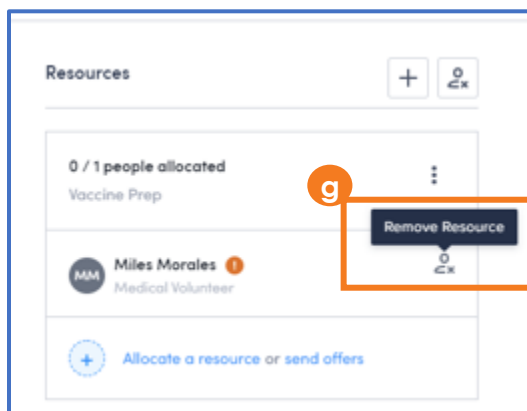
JOB-150507

2 48 Hours Before the Clinic (continued)

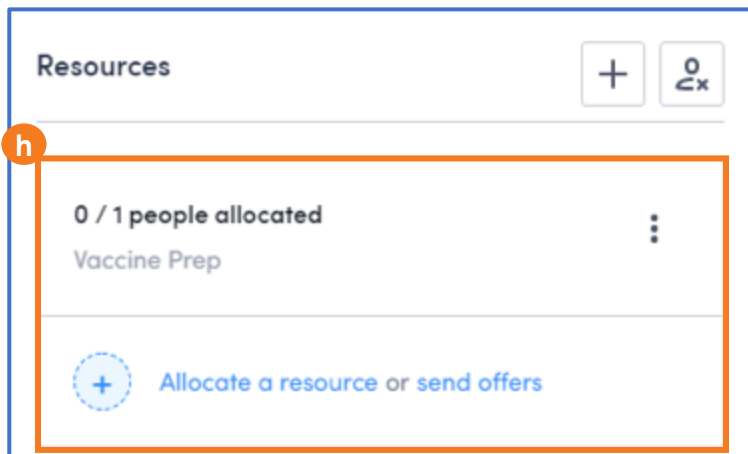


f. You will now be able to see the volunteers that are associated with the clinic and clinic shifts.

g. A volunteer that is not verified 48 hours before their shift is considered "Tentative". Deleting them from the shift will allow there to be an open allocation and potential to bring in a new verified volunteer for that shift. Press the "Remove Resource" button to remove the tentative volunteer but keep the shift open.



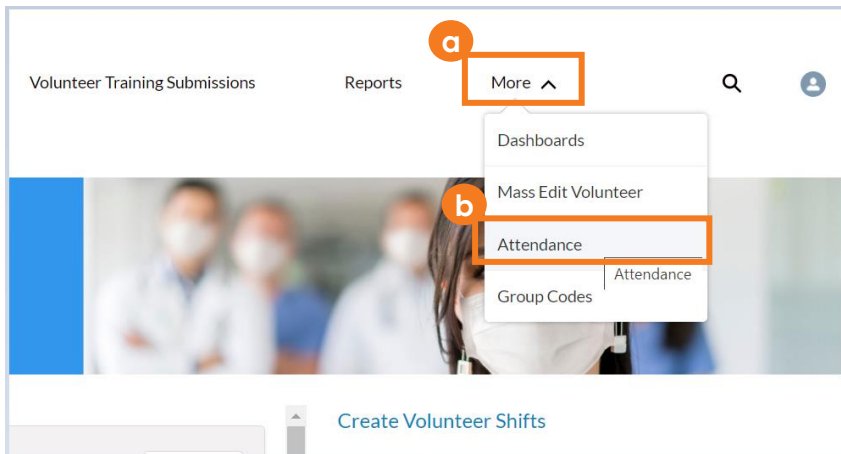
h. The shift is now open for the next 48 hours and available for a verified volunteer to join. It is important to note that **the Volunteer Director is expected to manually remove all tentative volunteers from their clinics.** You can navigate to the "Volunteer Director – Daily Volunteer Shift" report to see volunteers segmented by their status




3 24 Hours Before Shift (Checking In / Checking Out Volunteers)

a. 24 hours before your shift, click "More" from the My Turn Home page.

b. Select "Attendance" to check in (or check out) volunteers.



c. Enter the date and time of the shift.



Volunteer Shift Attendance

e

Check In

f

Check Out

c

Apr 16, 2021

8:00 AM

🕒

Search

	First Name	Last Name	Phone	Email	Skill	Check In	Check Out
d	<input type="checkbox"/>	Tommy	Tester	3124985865	michael.kelly5@icloud.com	Vaccine Prep	

d. When you're ready to check in or check out a volunteer, click the box to the left to check off all volunteers.

e. To check the volunteers in, click "Check In" at the top. You will get a notification that this has been completed.

e. To check the volunteers out, click "Check Out" at the top. You will get a notification that this has been completed.

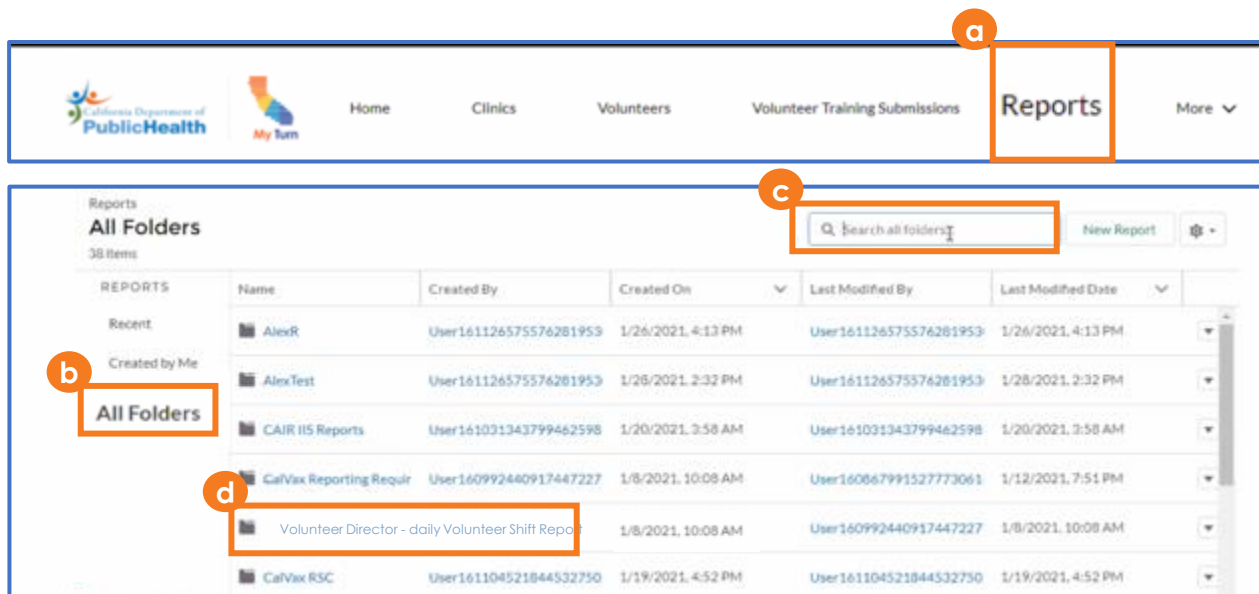
48

4

Day of the Clinic

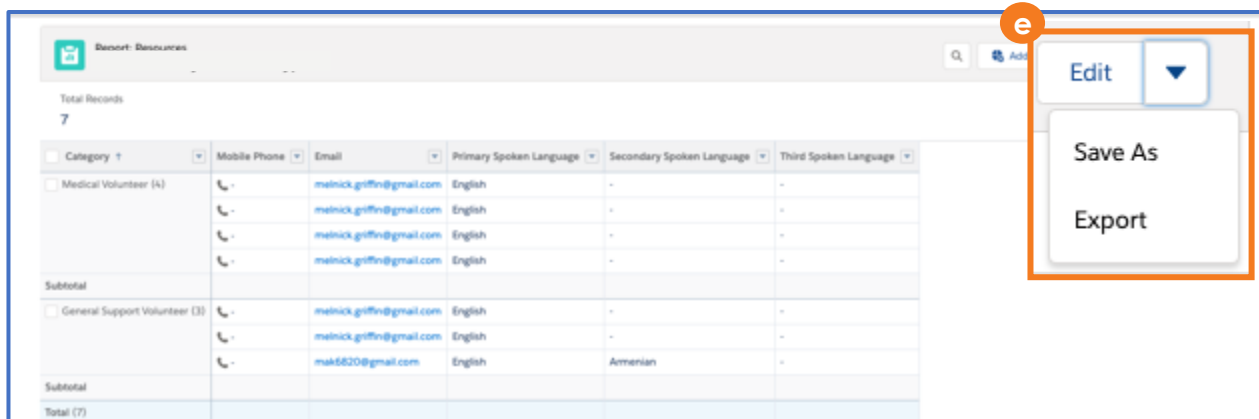
Once a volunteer has met all the criteria and the Volunteer Director has confirmed their scheduled shift, the Volunteer Director will oversee checking in of the volunteers during the day of the clinic. Let's now see how this is done:

- From the top of the page, click on the "Reports Tab."
- You will then press the "All Folders" tab on the left side of the screen.
- In the search bar type in "Volunteer Director - daily Volunteer Shift Report"
- After finding the report click on the report name to see the report details



REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	AlexR	User161126575576281953	1/26/2021, 4:13 PM	User161126575576281953	1/26/2021, 4:13 PM
Created by Me	AlexTest	User161126575576281953	1/26/2021, 2:32 PM	User161126575576281953	1/26/2021, 2:32 PM
All Folders	CAIR IIS Reports	User161031343799462598	1/20/2021, 3:58 AM	User161031343799462598	1/20/2021, 3:58 AM
	CalVax Reporting Requir	User160992440917447227	1/8/2021, 10:08 AM	User160867991527773061	1/12/2021, 7:51 PM
	Volunteer Director - daily Volunteer Shift Report	User160992440917447227	1/8/2021, 10:08 AM	User160992440917447227	1/8/2021, 10:08 AM
	CalVax RSC	User161104521844532750	1/19/2021, 4:52 PM	User161104521844532750	1/19/2021, 4:52 PM

- Once on the report, click the drop-down arrow next to edit, button at the top of the page and then click the "Export" option

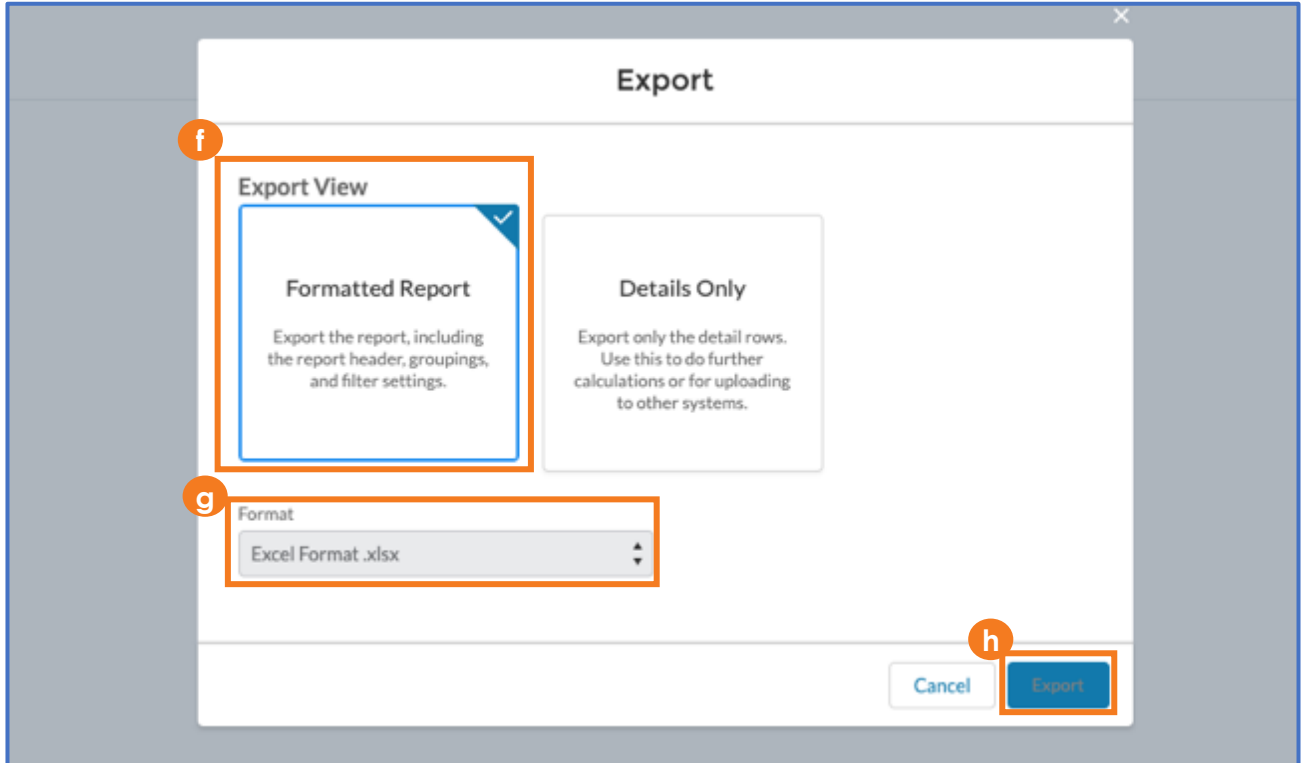


Category	Mobile Phone	Email	Primary Spoken Language	Secondary Spoken Language	Third Spoken Language
Medical Volunteer (4)		metnick.griffin@gmail.com	English	-	-
		metnick.griffin@gmail.com	English	-	-
		metnick.griffin@gmail.com	English	-	-
		metnick.griffin@gmail.com	English	-	-
Subtotal					
General Support Volunteer (3)		metnick.griffin@gmail.com	English	-	-
		metnick.griffin@gmail.com	English	-	-
		mak6820@gmail.com	English	Armenian	-
Subtotal					
Total (7)					

4

Day of the Clinic (continued)

- f. A pop-up window will appear after clicking Export. Select the “Formatted Report” option
- g. Next, ensure that the “Excel Format .xlsx” option is auto selected.
- h. Then click the “Export” button.



You will now have an excel sheet with a roster of expected volunteers that have shifts for that day's clinic. On the excel sheet, you are expected to mark down volunteer check-in information such as start time, end time, break, and no shows.

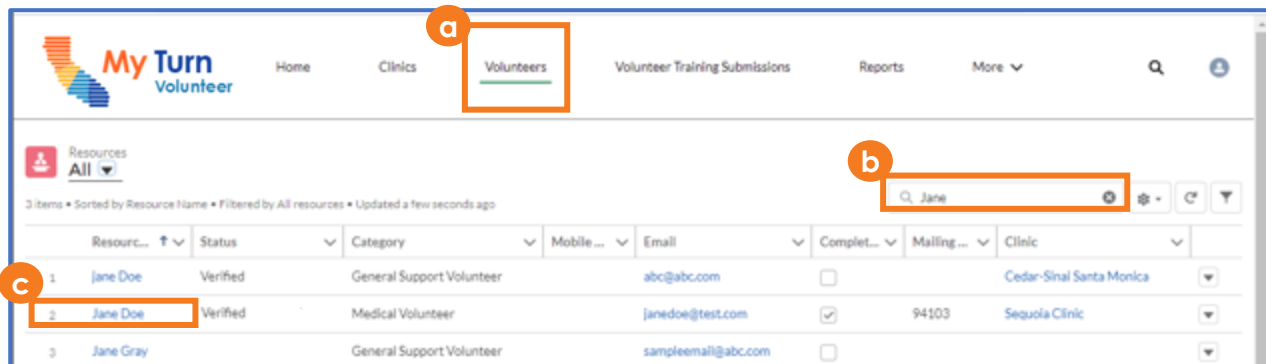
After the clinic has ended, you will need to take the data you had typed in the excel sheet and input it manually on the site. In the next few steps, let's see how this is done!

4

Day of the Clinic (continued)

Let's now see how to manually input volunteer check-in information into the site.

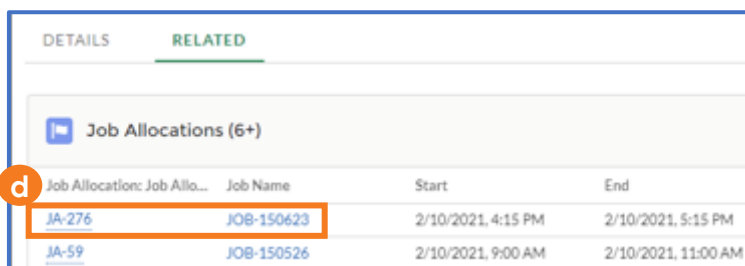
- Start by clicking on the "Clinics" section at the top of the homepage
- You will then search the name of the volunteer in the search bar
- Click on the name of the Volunteer.



The screenshot shows the My Turn Volunteer homepage. The navigation bar at the top includes links for Home, Clinics, **Volunteers** (highlighted with a red box 'a'), Volunteer Training Submissions, Reports, and More. Below the navigation bar, there is a search bar (highlighted with a red box 'b') containing the text "Jane". Below the search bar, there is a table of volunteers (highlighted with a red box 'c'). The table has columns for Resource Name, Status, Category, Mobile, Email, Completion, Mailing, and Clinic. The first three rows of the table are visible:

Resource Name	Status	Category	Mobile	Email	Completion	Mailing	Clinic
1 Jane Doe	Verified	General Support Volunteer		abc@abc.com	<input type="checkbox"/>		Cedar-Sinai Santa Monica
2 Jane Doe	Verified	Medical Volunteer		janedoe@test.com	<input checked="" type="checkbox"/>	94103	Sequoia Clinic
3 Jane Gray		General Support Volunteer		sampleemail@abc.com	<input type="checkbox"/>		

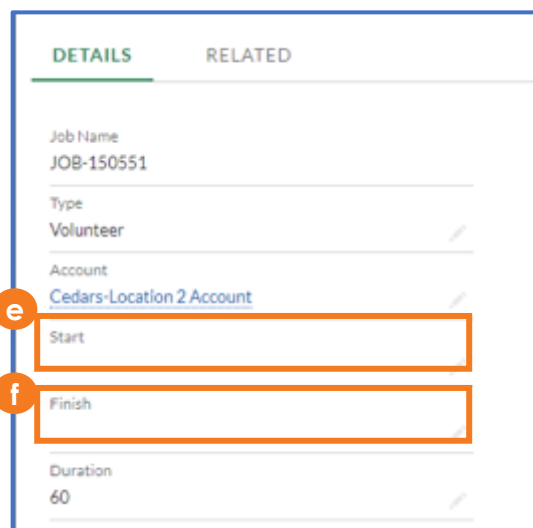
- On the Related tab, click the Job Name associated to the clinic for where the individual will be volunteering.



The screenshot shows the "Job Allocations" table under the "RELATED" tab. The table has columns for Job Allocation, Job Name, Start, and End. The first three rows of the table are visible:

Job Allocation	Job Name	Start	End
JA-276	JOB-150623	2/10/2021, 4:15 PM	2/10/2021, 5:15 PM
JA-59	JOB-150526	2/10/2021, 9:00 AM	2/10/2021, 11:00 AM

- In the details tab, click on the "Start" section and select the date and time that the Volunteer had showed up for their shift. It is important to note that if a volunteer does not show up, you simply do not fill in a start time. After the clinic has ended, the volunteer's name and details will be sent to a report for tracking.



The screenshot shows the "Job Details" form under the "DETAILS" tab. The form has fields for Job Name, Type, Account, Start, Finish, and Duration. The first three rows of the form are visible:

Job Name	Type	Account	Start	Finish	Duration
JOB-150551	Volunteer	Cedars-Location 2 Account			60

- You would click the "Finish" section to edit and put in the time that the volunteer had ended their shift at the clinic.

4

Day of the Clinic (continued)

Some additional responsibilities of the Volunteer Director after check-in will include:

- a. Offer a Brief Welcome & On-Site Clinic Debrief
- b. Review Safety & HIPAA protocols
- c. Ensure each volunteer is clear who they can turn to for task assignments and get their questions answered.
- d. Point out to volunteers where bathrooms and other resources are located to make their shift go smoothly.
- e. Make sure to instruct volunteers to check out at the end of their shift and where to do so. As well as check out for their own shifts at the end of their shift.

5

Day After the Clinic

An automatic thank you email is sent to the volunteers the day after the Clinic. We also want to thank you for your help in stopping the spread of COVID-19 and look forward to having you onboard!




Thank You For Your Support!

Appendix - Emails

As you know, communication is key when planning our events to ensure all involved parties know exactly what to do the day of their clinic. Our system has many auto-generated emails at important milestones between registering for a shift and after they volunteer. The purpose of this appendix is to ensure you know what our system is messaging volunteers at specific times. As a reminder, you can always reach out to your volunteers with more specific content to your clinic utilizing the email feature on page 16 of this job aid.

Volunteer Sign Up Email

Email sent after a potential volunteer has registered for a shift and is pending confirmation.



Hi <volunteer name>,

Thank you for stepping up to serve your community. Before you show up on site, please complete any training required to finalize your assignment. Depending on your volunteer role, training materials can be found here:

Medical Training Link
<https://calvax.force.com/VolunteerTraining/s/medical-volunteer-training>

General Support Training Link
<https://calvax.force.com/VolunteerTraining/s/volunteer-training>


You'll be asked to affirm you've completed your training. Once you complete any training and are screened by the clinic's Volunteer Director, your status will move from tentative to confirmed. Please wait for your confirmation email before coming to the vaccination clinic.

You've **tentatively registered** to be a <insert volunteer role> on <insert day and date of shift> from <start and end time of shift>.

Your Site Volunteer Director will reach out to share additional information specific to your volunteer location. In addition, you'll receive an email and/or text reminder two days prior to your shift with a final set of details. Thanks again for stepping up to #StopTheSpread of COVID-19.

My Turn – Volunteer Team
#VaccinateALL58

Official California State Government Email



Confirming Volunteer Registration Email



72 Hours Before Volunteer Shift Email



48 Hours Before Shift Email



Hi <insert name of volunteer>,

Thank you for signing up to insert volunteer role at <insert location of opportunity> on <insert day and date of shift> from <start and end time of shift>.

On your first shift, please:

- Arrive 15 minutes before your shift starts to allow time for parking.
- Bring a government-issued ID for check-in.
- Bring a mask to wear throughout your shift.
(site-specific requirements may be added here)

Thanks again for stepping up to #StopTheSpread. See you on <insert day(s) of shift>!

If you are no longer able to serve, please reach out to me at <insert contact information> **immediately**.

Thank you,

<insert name of Volunteer Director>
<insert contact information for Vol Director>

If your availability has changed and you need to [cancel your shift](#), please let me know as soon as possible.

Official California State Government Email



24 Hours Before Shift Email



Hi <insert name of volunteer>,

Are you ready to be a <insert volunteer role> at <insert location of opportunity> from <start and end time of shift>? Yes! We'll see you tomorrow.

Please remember to:

- Arrive 15 minutes before your shift starts to allow time for parking.
- Bring a government-issued ID for check-in.
- Bring a mask to wear throughout your shift.
(site-specific requirements may be added here)

See you soon!

<insert name of Volunteer Director>
<insert contact information for Vol Director>


P.S. If you are no longer able to serve today, please reach out to <insert volunteer director contact information> **immediately**.

If your availability has changed and you need to [cancel your shift](#), please let me know as soon as possible.

Official California State Government Email



Day of the Clinic Email



Hi <insert name of volunteer>.

Today is your day to be <a/an> <insert volunteer role> at <insert location of opportunity> from <start and end time of shift>.

Please remember to:


- Arrive 15 minutes before your shift to allow time for parking.
- Bring a government-issued ID for check-in.
- Bring a mask to wear throughout your shift.

(site specific requirements may be added here)


See you soon!

If your availability has changed and you need to cancel your shift, please let me know as soon as possible.

Official California State Government Email



Day After Clinic Thank You Email



Hi <insert name of volunteer>.

Thank you for stepping up to #StopTheSpread by volunteering at <insert location of opportunity>.

Click [here](#) to register for another volunteer opportunity at this vaccination site or a different site in your area. Also, we value your opinion. Please tell us what your volunteer experience was like by doing this brief [survey](#).

<<Embedded Thank You Video>> from GGN / CSO.


Thanks again for helping accelerate the distribution of vaccinations across California. #VaccinateALL58. We appreciate volunteers like you.

In Service,

Josh Fryday
Chief Service Officer

<insert name of Volunteer Director>
Volunteer Director

Official California State Government Email



Volunteer Shift is Cancelled Email



Clinic is Cancelled Email

